

# Aligning IT Strategy and Execution with

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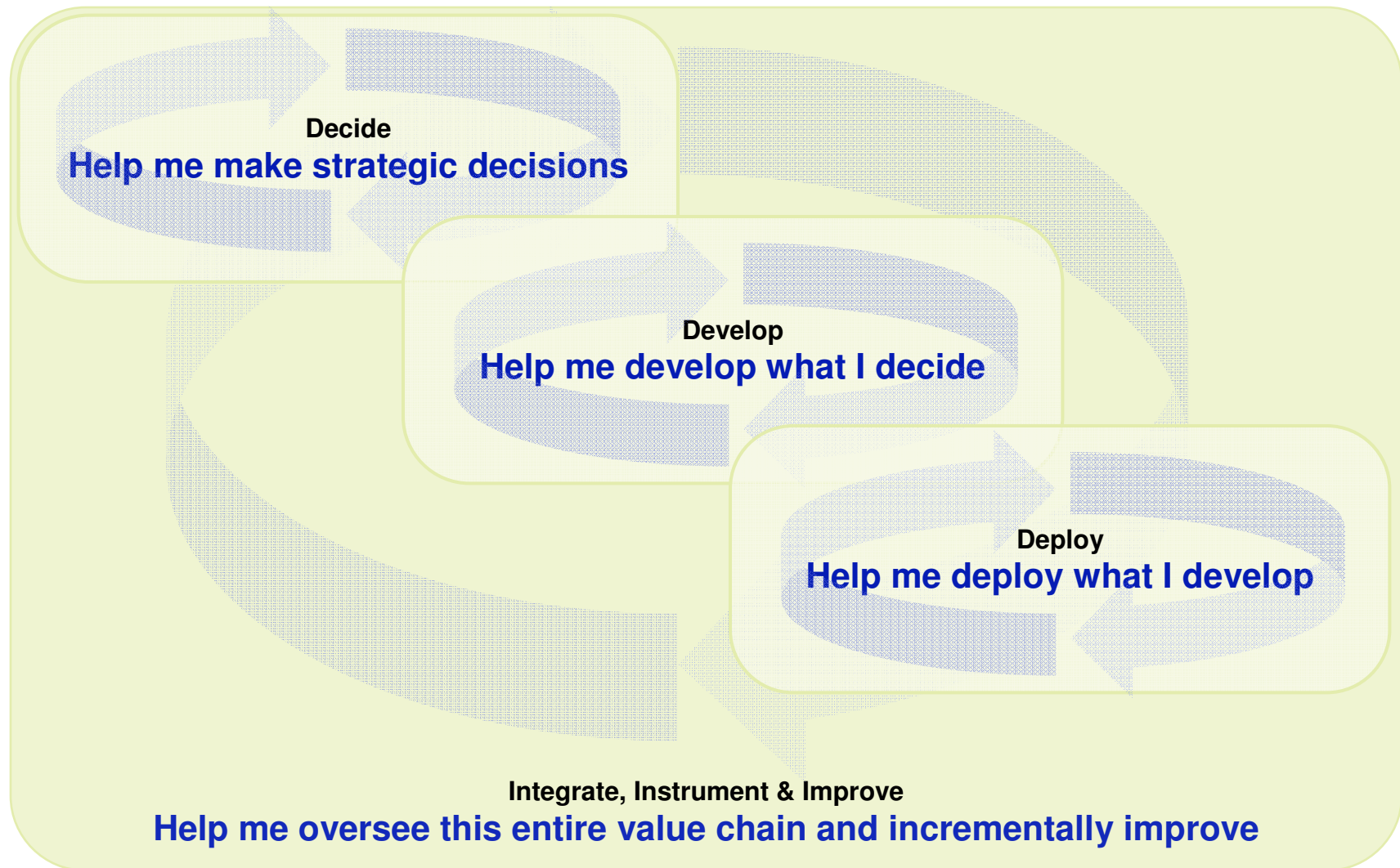
## Abstract

Investments in IT applications and projects must be aligned with business strategy in order for enterprises to achieve their goals. Rational is introducing enhancements to Rational Focal Point and Rational Team Concert that will help you achieve this critical alignment. Rational Focal Point has improved capabilities for defining, prioritizing, and managing your project portfolio, and has new integrations with Rational Team Concert for linking the portfolio with the executing projects. Rational Team Concert has also been enhanced with improved project management capabilities that enable it to manage traditional and hybrid projects in addition to Agile projects. This session describes and demonstrates the new capabilities in Rational Focal Point and Rational Team Concert for aligning strategy and execution.

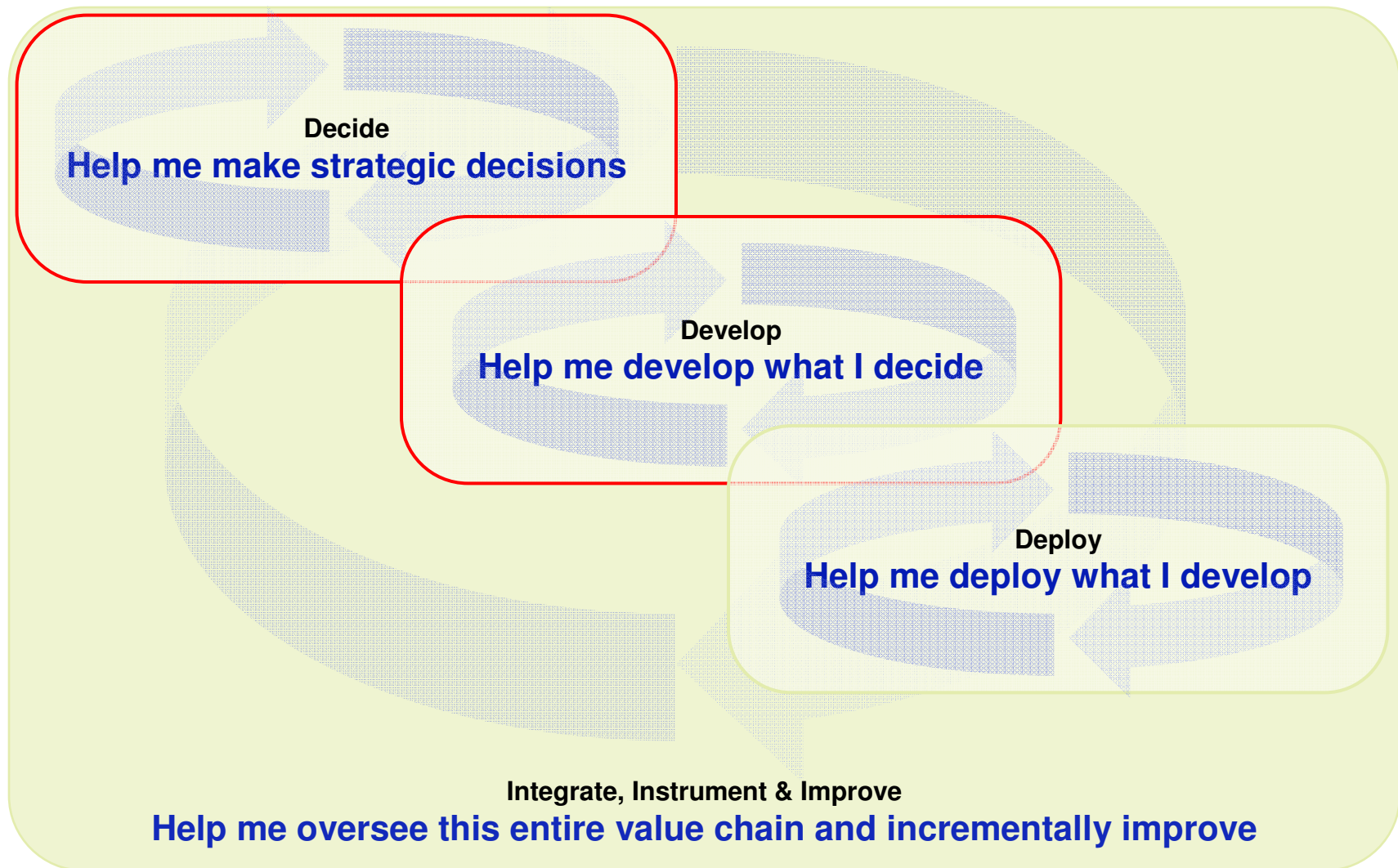
## Agenda

- Overview – Arthur, 25 min.
  - ▶ Aligning IT strategy and execution
  - ▶ Managing IT portfolios with Rational Focal Point
  - ▶ Planning and executing development projects with Rational Team Concert
  - ▶ Linking Rational Focal Point and Rational Team Concert
- Demo – Karthi, 25 min.
  - ▶ Rational Focal Point: Define and approve projects for implementation
  - ▶ Rational Team Concert: Plan and execute development tasks in an approved project
  - ▶ Rational Focal Point: Monitor an executing project
- Q & A – All, 10 min.

## IT customer challenges



## IT customer challenges



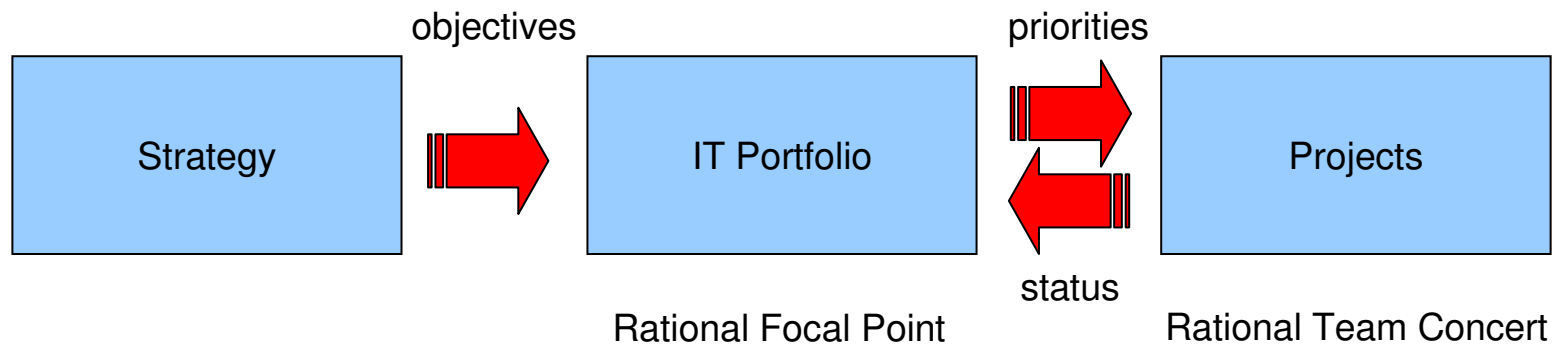
## Aligning IT strategy and execution

- In general, the process of portfolio management consists of
  - ▶ Creating a portfolio of investments that aligns with your strategic goals, is balanced, and has the desired risk/reward tradeoffs
  - ▶ Continually monitoring the performance of the portfolio and making adjustments to maintain the desired characteristics
- IT investments include infrastructure, applications, and projects
  - ▶ Our focus in this session is on application development projects
- IT Portfolio Management is a best practice for aligning IT investments with business strategy
  - ▶ New projects proposals are assessed in the context of the existing portfolio and may result in the suspension or termination of existing projects

## Rational IT portfolio management overview

- Rational Focal Point gives you IT portfolio management capabilities
  - ▶ Helps you make strategically aligned application development project investment decisions
  - ▶ Enables you to monitor the implementation progress of those projects
- Rational Team Concert gives you integrated, developer-centric project planning and execution capabilities
  - ▶ Agile and traditional planning
  - ▶ Plan items are linked to development work items
- Approved projects in Rational Focal Point can be linked to development plans in Rational Team Concert
- Project status in Rational Focal Point can be updated from plan snapshots in Rational Team Concert
- These linkages help you establish and maintain alignment of your IT project investments with your business strategy

## Aligning projects with strategy through IT portfolio management





## Managing IT portfolios with Rational Focal Point

- Rational Focal Point is a highly configurable, Web-based collaboration tool that helps business users collect, visualize, analyze, and prioritize information
- Rational Focal Point includes predefined templates, for:
  - ▶ Product Management
  - ▶ Product Portfolio Management
  - ▶ IT Portfolio Management
- You can modify these templates or create your own from scratch
- We'll focus on the IT Portfolio Management template in this session
  - ▶ For more information, see [IT portfolio management template](#), Rational Focal Point InfoCenter

## IT portfolio management template structure

- The IT portfolio management template contains custom domain entities (modules), user roles, and a lifecycle process (state transitions) for managing project initiation and monitoring project execution
  - ▶ Also includes a dashboard for monitoring portfolio status and health
- Domain entities – business needs, applications, projects, ...
- Roles – business stakeholder, IT analyst, project management office, ...
- Lifecycle – draft, ready for prioritization, approved for implementation, ...

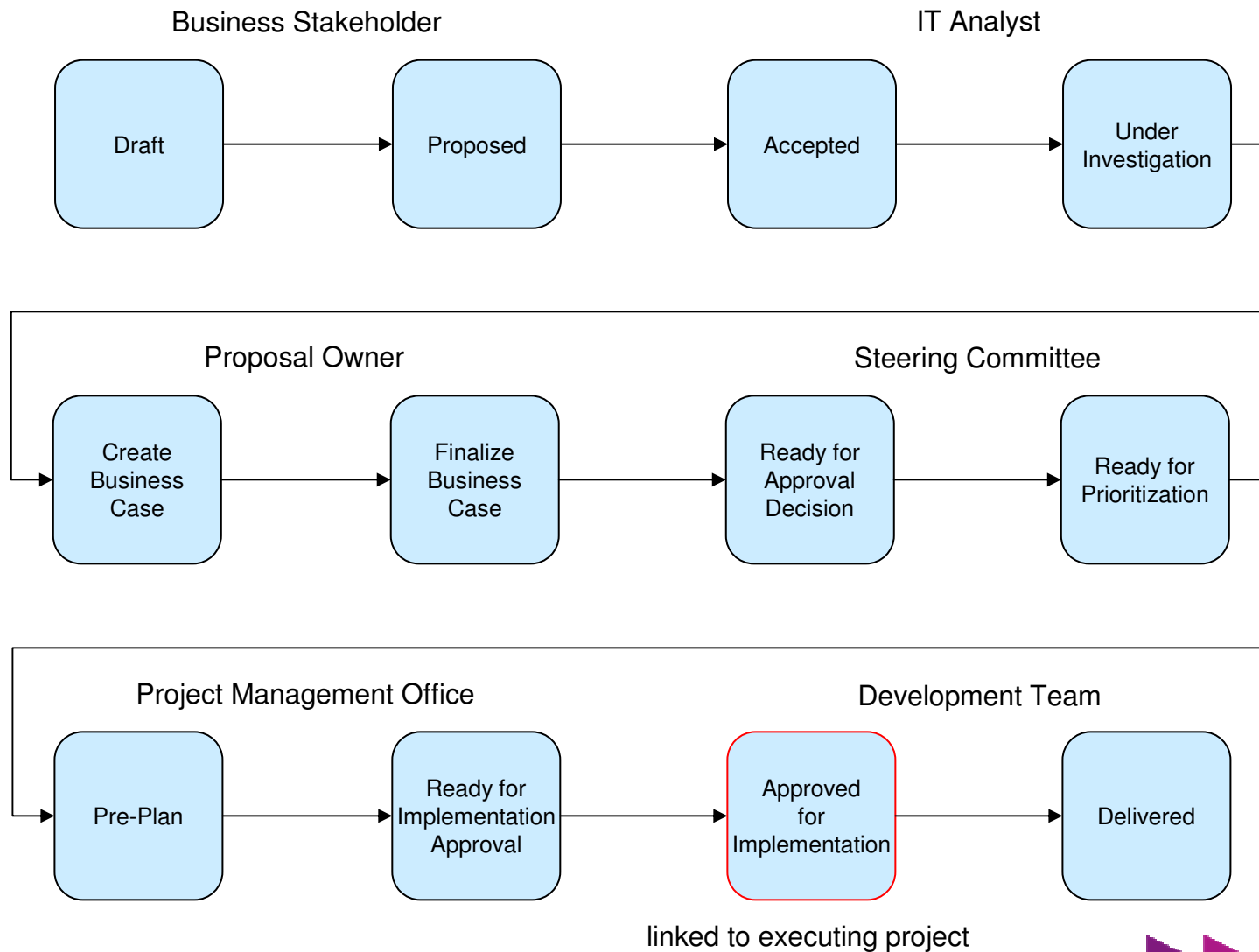
## IT portfolio management domain entities

- *Strategic Objectives* are high-level business targets or themes
- *Business Units* are high-level parts of the business organization
- *Business Needs* are high-level requirements from the business point of view
- *Applications* are software systems that fulfill business needs
- *Projects* are time-bounded work efforts that implement some business needs
- *Portfolios* are sets of related projects
- *Risks* are possible events that would negatively affect projects
- *Resource Pools* are sets of people that work on projects
- *Allocations* are assignments from resource pools to projects
- *Rates* are costs associated with project roles in resource pools

## IT portfolio management roles

- *Business Stakeholder* creates and submits project proposals and business needs
- *IT Analyst* assesses and triages proposals
- *Proposal Owner* develops business case for project proposals
- *Steering Committee* plans and prioritizes projects; balances and monitors portfolio
- *Application Gap Analyst* identifies most needed enhancements to applications
- *Project Management Office* plans and monitors projects
- *Finance* enters financial data for applications and projects
- *Executive Stakeholder* reviews and monitors overall portfolio status and health

# IT portfolio management project lifecycle



## Planning development projects with Rational Team Concert

- Rational Team Concert is a web-based, collaborative development tool that integrates
  - ▶ Developer-centric project planning
  - ▶ Change management
  - ▶ Configuration management
  - ▶ Build management
- We are focusing on its planning capabilities in this session

## Relation with Rational Project Conductor

- Rational Team Concert 3.0 now supports both Agile and traditional projects
- Many traditional project planning features previously delivered in Rational Project Conductor 1.0 have been added
- Rational Project Conductor has been discontinued
- Current Rational Project Conductor customers can upgrade to Rational Team Concert
- For more information, see [Where is Rational Project Conductor?](#), Neil Leblanc, Jazz Team Blog, 2011-01-18

## Planning enhancements in Rational Team Concert 3.0

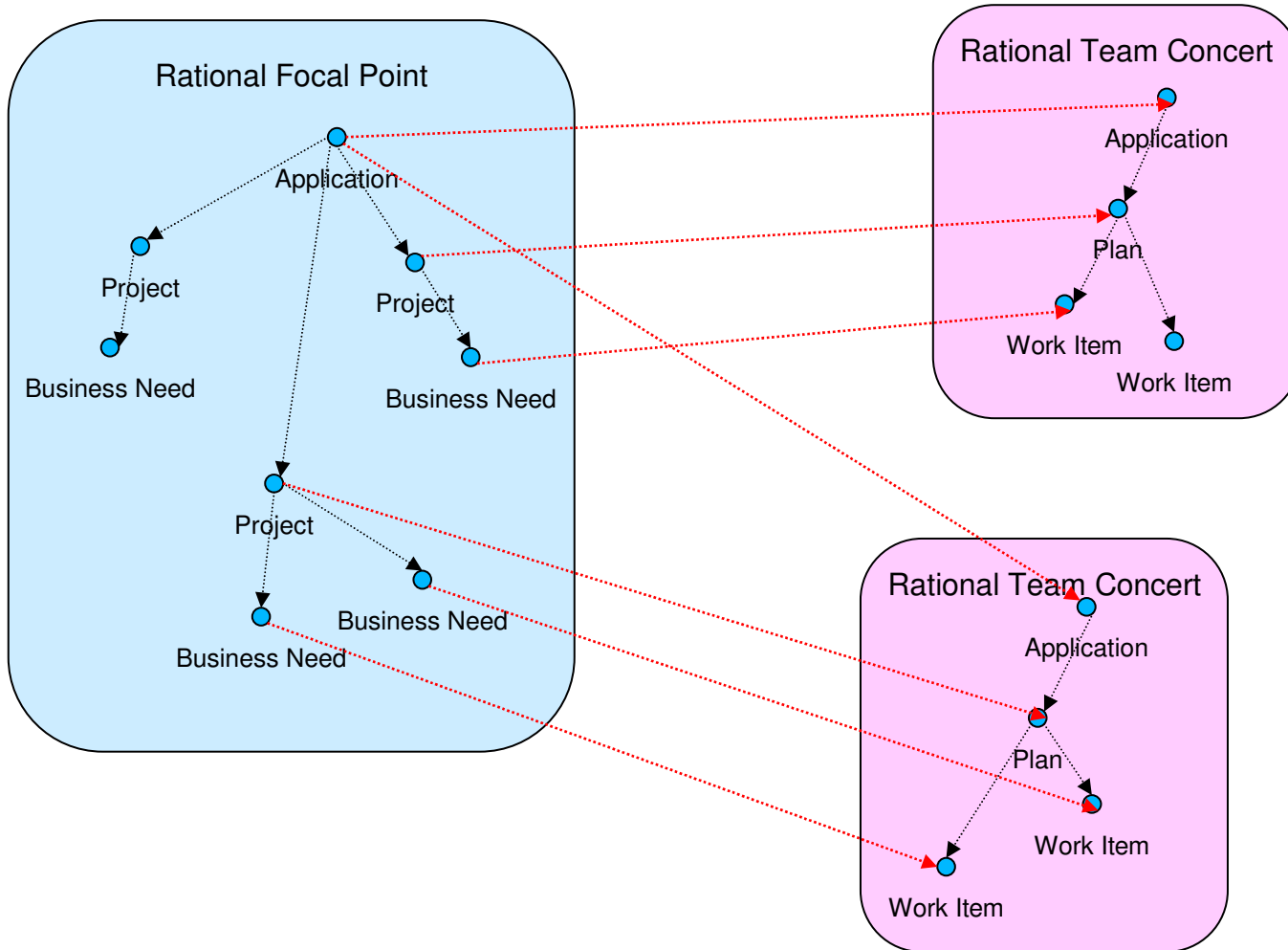
- Formal Project Management process template
  - ▶ Defines phases and work item types, including risks, for traditional project plans
  - ▶ Critical path task scheduler (schedule constraints and dependencies)
- Timeline view (Gantt chart/roadmap) for plans
- Microsoft Project 2007 plan import and export
- Resource search and allocation for plans, projects, and teams
- Time tracking in work items
  - ▶ Record time worked by day, by person, and by type (time code)
  - ▶ Data is available for integration with external timesheet or billing applications
- Plan snapshots record status and schedule at a point in time
  - ▶ Used to update project status in Rational Focal Point
- For more information, see [Countdown to the next Rational Team Concert: Part I – Planning Enhancements](#), Jean-Michel Lemieux, Jazz Team Blog, 2010-10-26



## Linking Rational Focal Point to Rational Team Concert

- Rational Focal Point uses REST APIs provided by Rational Concert Team
  - ▶ Open Services for Lifecycle Collaboration (OSLC) Change Management (CM)
- Application linking
  - ▶ administrator configures Rational Focal Point as a consumer of Rational Team Concert, including OAuth credentials
- Project linking
  - ▶ This link is established by sending the project to Rational Team Concert for execution
  - ▶ Projects in Rational Focal Point are linked to plans in Rational Team Concert
  - ▶ Project status is pulled back into Rational Focal Point from the current plan snapshot in Rational Team Concert
- Business need linking
  - ▶ Links are created when project is sent, and new links can be added manually later
  - ▶ Business needs in Rational Focal Point are linked to work items in Rational Team Concert
  - ▶ Rational Focal Point displays rich hovers using the OSLC CM API

# Linking from Rational Focal Point to Rational Team Concert

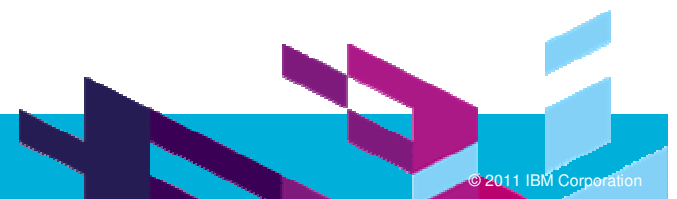


## Summary

- IT portfolio management helps you align application development project investments with strategic objectives
- Rational Focal Point provides rich IT portfolio management capabilities
- Rational Team Concert provides rich developer-centric planning capabilities for Agile, traditional, and hybrid projects
- You can link your IT portfolio in Rational Focal Point to your executing development projects in Rational Team Concert so you can maintain strategic alignment and achieve the desired balance and risk/reward trade-offs



[www.ibm/software/rational](http://www.ibm/software/rational)



## Demo Storyboard

1. Configuring Rational Focal Point with a connection to Rational Team Concert
2. Scoping the project in Rational Focal Point
3. Sending the project from Rational Focal Point to Rational Team Concert
4. Executing the project in Rational Team Concert
5. Updating the project status in Rational Focal Point from Rational Team Concert

## 0.1 Rational Team Concert 3.0

Change and Configuration Management (/ccm)

Application Administration Francis Parks

Application Users Project Areas Templates Reports

▼ Status

- Status Summary
- Statistics
- Component Status
- Active Services

▼ Configuration

- Database Connection
- Feed Settings
- Themes
- Advanced Properties

▼ Communication

- Consumers (Inbound)
- Friends (Outbound)
- Whitelist (Outbound)

### Status Summary

Application Status		VM Memory Usage	
Database Status	Connected	Maximum Memory Allocation	1200 MB
Uptime	3 hours, 17 minutes	Current Memory Allocation	409 MB
Public URI	<a href="https://rpcdemo.dev.ratcore.ibm.com:9443/ccm">https://rpcdemo.dev.ratcore.ibm.com:9443/ccm</a>	Free Memory (of Current)	34 %

### Application Information

Jazz Team Server Location Connected to: <https://rpcdemo.dev.ratcore.ibm.com:9443/jts>

### Build Information

Change and Configuration Management - Core Libraries	3.0 (RTC-I20101112-1731)
Jazz Foundation - Core Libraries	3.0 (RJF-I20101112-0630)

### Application VM

Version	1.5.0
Vendor	IBM Corporation
Name	IBM J9 VM
Details	J2RE 1.5.0 IBM J9 2.3 Windows XP x86-32 j9vmwi3223ifx-20100511 (JIT enabled) J9VM - 20100509_57823_JHdSMr JIT - 20091016_1845ifx7_r8 GC - 20091026_AA

### Database Status

Find:  Next Previous Highlight all Match case

Read rpcdemo.dev.ratcore.ibm.com en-US

## 0.2 Rational Focal Point 6.5.0.1

**Rational Focal Point 6.5**

Application Information

Version	6.5.0.1
Build ID	FP6501-I20110407_1224
Build Date	4/7/11 12:24 PM
Architecture	x86 Windows XP
Java	Sun Microsystems Inc. 1.6.0_18
Database	PostgreSQL 8.3.7
Rational Focal Point Server Uptime	1 day, 7 hours, 35 minutes
Rational Focal Point Server Node Id	RPCDemo.dev.ratcore.ibm.com[9.124.29.87][A1D2AD84284C38EDF9BA18A61038D566]
Servlet Engine	Apache Tomcat/5.5.27
Rational Focal Point Memory	<input type="text"/>
Connection Pool	<input type="text"/>
Local Time According to Server	4/19/11 8:06 PM IST

**Rational Focal Point License**

License Information

Support ID	DEVELOPMENT-DEVELOPMENT-DEVELOPMENT-DEVELOPMENT
Support Password	DEVELOPMENT-DEVELOPMENT-DEVELOPMENT-DEVELOPMENT

**Browser statistics**

User-Agent	Number of visits	%
Mozilla/5.0 (Windows; U; Windows NT 5.1; en-US; rv:1.9.1.18) Gecko/20110319 (CK-IBM) Firefox/3.5.18	4	100%

**Screen size statistics**

Screen size	Number of visits	%
1920x1200	4	100%

**Browser Java version statistics**

IBM. Rational. software

Find: ts Under Implementation Next Previous Highlight all Match case

Done

# 1.1 Create connection to RTC server

The screenshot shows the Rational Focal Point web interface in a Mozilla Firefox browser. The main content area displays the 'Server Friends List' table, which is currently empty. A dialog box titled 'Add OAuth Friend' is open, allowing the user to add a new friend. The fields in the dialog are filled with the following information:

Field	Value
Name	RTC
Root Services URI	https://rpcdemo.dev.raticore.ibm.
OAuth Consumer Key	b4b228048fba90067e7609a1246
OAuth Secret	••

The dialog box also includes 'Save' and 'Cancel' buttons. The left sidebar of the application shows a navigation menu with categories like 'General', 'Application', 'Add', 'Display', 'Users', and 'Advanced'. The 'Friends' link under the 'Application' category is highlighted. The bottom of the screen shows the Windows taskbar with various open applications and the system clock indicating 8:14 PM on Tuesday, 4/19/2011.



## 1.2 Connection created

The screenshot shows the Rational Focal Point web interface in a Mozilla Firefox browser. The browser address bar shows the URL: `http://localhost:8080/fp/servlet/WorkSpaceController?file=/start/index.jsp&FPaction=leaveProject&t=1303223410546&FP_projectid=4&SKEY=B35CF8240DAC1032A5ED4AA4`. The page title is "Rational Focal Point". The navigation bar includes "Workspaces | Preferences | Admin | Help [Local Help Updater|Change Password] | Log Out".

The main content area is titled "Server Friends List" and contains a table with the following data:

Name	Root Services URI	OAuth Consumer Key
RTC	<code>https://rpcdemo.dev.ratlcore.ibm.com:9443/ccm/rootservices</code>	<code>68887b4b228048fa90067e7609a1246</code>

The left sidebar shows a navigation menu with categories: "General" (Workspaces, Workspace Templates, Global Attributes, Report Templates, Report Images, About Rational Focal Point), "Application" (Mail, Support and Contact, Proxy, Login Page, Security, Data Access, Friends), "Add", "Display", "Users", and "Advanced". The "Friends" option is currently selected.

The bottom of the browser window shows the search bar with the text "ts Under Implementation", the taskbar with various application icons, and the system tray showing the time as 8:14 PM on Tuesday, 4/19/2011.

## 2.1 Select prioritized business needs

The screenshot displays the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is [http://localhost:8080/fp/servlet/WorkspaceController?file=/common/index.jsp&FP\\_projectid=1&SKEY=B35CF8240DAC1032A5ED4AA42B6DF06C](http://localhost:8080/fp/servlet/WorkspaceController?file=/common/index.jsp&FP_projectid=1&SKEY=B35CF8240DAC1032A5ED4AA42B6DF06C). The application header shows "Rational Focal Point" and navigation links for "Workspaces", "Home", "Preferences", "Admin", and "Help".

The main content area is titled "Display > Business Needs". On the left, a sidebar menu lists various modules, with "Business Needs" highlighted in red. The central pane shows a list of business needs items, with item "013: Compare CD Rates with other Banking Providers and Online Providers" highlighted in blue and circled in red. The right pane displays the details for this selected item, including fields for "Work Item State", "Priority", "Completeness (%)", "Responsible", "Target Start Date", "Planned Start Date", "Actual Start Date", "Target End Date", "Planned End Date", "Actual End Date", "Snapshot Date", "Effort", "Estimated Effort", "Planned Effort", "Actual Effort", "Actual vs Planned", "Links", "Application", "Projects", "Related to Business Needs", "Related from Business Needs", "Work Items", "Risk Analysis", and "Technology Risk". The "Projects" field is also circled in red.

The bottom of the interface shows a search bar with the text "ts Under Implementation", a search button, and navigation controls. The system tray at the bottom right indicates the time is 8:14 PM on Tuesday, 4/19/2011, and the system is running in en-US locale.

## 2.2 Link business needs to project

The screenshot shows the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is "http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP\_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C".

The application header includes "Rational Focal Point" and navigation links: "Workspaces | Home | Preferences | Admin | Help [Local Help Updater|Change Password] | Log Out". The breadcrumb trail is "Display > Business Needs".

The left sidebar contains a "Modules" tree with "Business Needs" selected and highlighted with a red box. Other modules include Strategic Objectives, Portfolios, Project Pre-Planning, Project Roadmap, Projects Under Implementation, Approved Projects, Projects On Hold or Stopped, Projects, Applications, Risks, Resource Pools, Resource Allocations, Resource Profile Rates, My Draft Project Proposals, My Projects, My Business Needs, Process, Use Cases, Change Roles, Projects To Delete, and Business Needs To Delete.

The main content area is titled "Editing Projects for the selected elements." and contains the following sections:

- Projects contains:** A search field with "Fin\*" entered.
- Projects does not contain:** An empty search field.
- Select Projects:** A list of projects with checkboxes. "Financing factory" is checked and highlighted with a red box. Other projects include "Projects", "Maintenance Program", and "Financing factory".
- Projects related to the business need:** A section for related projects.

At the bottom of the main area, there are instructions: "To add more than one link, use the check boxes and click OK when you are done." and buttons for "OK", "Cancel", and "Delete All Links".

The footer of the application shows the IBM logo, "Rational software", and a search bar with "ts Under Implementation" and navigation controls. The status bar at the bottom right indicates "2 Errors" and "en-US".

## 2.3 Project showing business needs

The screenshot displays the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is "http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP\_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C".

The application header shows "Rational Focal Point" with navigation links for "Workspaces", "Home", "Preferences", "Admin", and "Help". The breadcrumb trail is "Modules > Projects".

The left sidebar contains a "Modules" tree with "Projects" selected. Below it are "Add" and "Display" sections.

The main content area is divided into two panes:

- Projects (4/127) tree:** A hierarchical list of projects. "Financing factory" is selected and highlighted with a red box.
- General Information pane:** Displays details for the selected project:
  - ID: 140
  - Title: Financing factory
  - Project State: Approved for implementation (highlighted with a red box)
  - Description:
  - Type: Cost reduction
  - Portfolio: External Applications
  - Submitter: David
  - Proposal Owner:
  - IT Analyst: Sam
  - Business Units: Operations
  - Comments:

Below the "General Information" pane is a "Scope" section with a list of business needs:

- 010: Automatic monitoring and alerts
- 011: Change fund
- 012: Client history
- 013: Compare CD Rates with other Banking Providers and Online Providers
- 014: Component content
- 015: Document and promote our security efforts

At the bottom of the interface, there is a search bar with the text "ts Under Implementation" and a status bar showing "Done" and "en-US".

## 2.4 Specify project target start and end dates

The screenshot shows the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is "http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP\_projectid=1&SKEY=B35CF8240DAC1032A5ED4AA42B6DF06C".

The application interface includes a navigation menu on the left with "Projects" selected. The main content area displays details for a project named "Financing factory" under the "Maintenance Program" folder. The project description is "015: Document and promote our security efforts".

Key project metrics and dates are highlighted with red boxes:

- Total Estimated Effort: 31,930 hours
- Total Planned Effort: 0 hours
- Total Actual Effort: 0 hours
- Days Delay: 0 days
- Resource Management: Scheduling
- Duration: -504 months
- Target Start Date: 6/1/11
- Planned Start Date: -
- Actual Start Date: -
- Target Implementation Date: -
- Planned Implementation Date: -
- Actual Implementation Date: -
- Target End Date: 8/31/11
- Planned End Date: -
- Actual End Date: -
- Target Delivery Date: -
- Planned Delivery Date: -
- Actual Delivery Date: -
- Snapshot Date: -

At the bottom of the interface, there are buttons for "Add Project", "Add Business Needs", "Add Folder", "Turn Into Folder", "Delete", and "Import Projects". The IBM logo and "Rational software" branding are visible at the bottom right.

## 3.1 Send the project to RTC

The screenshot shows the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The address bar shows the URL: `http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C`. The application header includes "Rational Focal Point" and navigation links like "Workspaces | Home | Preferences | Admin | Help".

The main content area displays a list of projects under "Approved Projects". The "Financing factory" project is selected and its details are shown in a table:

General Information	
ID	140
Title	Financing factory
Description	
Type	Cost reduction
Portfolio	External Applications
Submitter	David
Proposal Owner	-
IT Analyst	Sam
Business Units	Operations
Comments	-

Below the table, there are sections for "Links", "Value Statements", "Initial Estimations", "Risk Assessment", "Financial Information", "Project Implementation", and "Scope". The "Scope" section is highlighted with a red box and contains the following items:

- 010: Automatic monitoring and alerts
- 011: Change fund
- 012: Client history
- 013: Compare CD Rates with other Banking Providers and Online Providers
- 014: Component content

At the bottom of the application, there is a search bar with the text "ts Under Implementation" and navigation buttons like "Next", "Previous", "Highlight all", and "Match case". The IBM logo and "Rational software" are visible in the footer.

## 3.2 Select and log in to the RTC server

The screenshot shows a Mozilla Firefox browser window displaying the Rational Focal Point web application. The browser's address bar shows the URL: `http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP_projectid=1&SKEY=B35CF8240DAC1032A5ED4AA42B6DF06C`. The application interface includes a navigation menu on the left with categories like 'Modules', 'Add', 'Display', 'Prioritize', 'Visualize', and 'Reports'. The main content area shows a tree view of projects under 'Projects (4/21)', with 'Financing factory' selected. A modal dialog box titled 'Please enter your Jazz login credentials' is open, featuring a text input field containing 'Jazz server', a dropdown menu set to 'RTC', and a 'Log In' button. The bottom of the browser window shows the search bar with the text 'ts Under Implementation' and the status 'Done'.

### 3.3 Select the process template, work item type, and owner

The screenshot shows the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The address bar shows the URL: `http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C`. The application header includes "Rational Focal Point" and navigation links for "Workspaces", "Home", "Preferences", "Admin", and "Help".

The main content area displays a tree view of "Projects (4/21)" with the following structure:

- Maintenance Program
  - Financing factory
  - Automated Clearing House (ACH)
  - Employee Timecard System
  - Home Equity Tracking System
  - Personal Tax Services
  - Online Bill Payment
  - Automatic Card Replacement Service
  - Inventory Control Upgrade
- Research Program
- Development Program

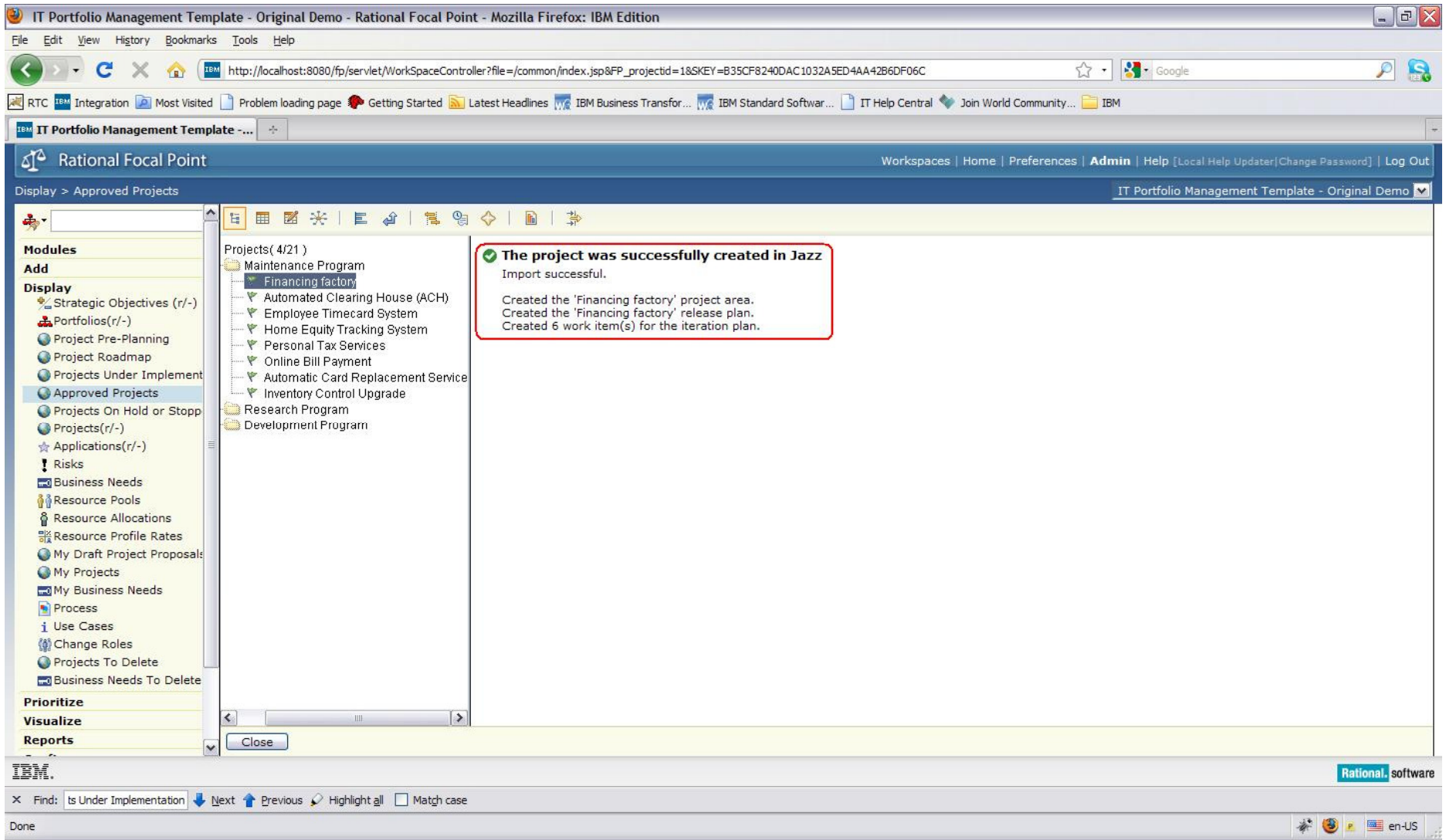
A dialog box titled "Specify Process Template, Work Item Type and Owner" is open, containing the following fields:

- Process Template: Formal Project Management Process
- Work Item Type: Business Need
- Owner: A dropdown menu with the following options: ADMIN, ADMIN, Arthur Ryman, Francis Parks, GUEST, Unassigned, ccm\_user.

A "Create" button is located below the Owner dropdown. The IBM logo and "Rational software" are visible in the bottom right corner of the application window.



### 3.4 Project created successfully



## 3.5 Project linked to plan in RTC

The screenshot shows the Rational Focal Point web application interface. The browser address bar indicates the URL: `http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C`. The application title is "Rational Focal Point" and the user is logged in as "Admin".

The interface is divided into several sections:

- Left Navigation Panel:** Lists various modules such as Portfolios, Projects, Applications, Business Units, Risks, Business Needs, Resource Pools, Allocations, Rates, Criteria, Administration, Images, Use Cases, Attributes, and Attribute Groups. Under the "Add" section, it lists "Strategic Objectives (r/-)", "Portfolios(r/-)", "Project Pre-Planning", "Project Roadmap", "Projects Under Implement", "Approved Projects", "Projects On Hold or Stopp", "Projects(r/-)", "Applications(r/-)", and "Risks".
- Tree View:** A hierarchical tree structure showing project folders. The "Financing factory" folder is highlighted in red. Other folders include "Maintenance Program", "Innovative banking", "Business regulations", "ED I Invoicing", "Integrated banking solution", "Account analysis", "Business agility", "Fixed deposits", "Interest calculation", "Locker monitoring system", "Online application forms", "Outgoing funds transfer", "Debit Card Renewal", "Online insurance quotes", "Supplemental Insurance", "Syndicated loans", "Bankruptcy admin", "Securitisation", "Future bond trend calculator", "Repos", "Liquidity management", "Reinbursements authentica", "Leasing", "Interest rate changes", "Automated Clearing House", "Company Firewall Upgrade", "Consolidated Banking Portf", "Electronic bank book", "Virtualization", and "Account lists".
- Main Content Area:** Displays the details for the "Financing factory" project.
 

Financing factory	
<b>General Information</b>	
ID	140
Title	Financing factory
Project State	Approved for implementation
Description	
Type	Cost reduction
Portfolio	External Applications
Submitter	David
Proposal Owner	-
IT Analyst	Sam
Business Units	Operations
Comments	-
<b>Links</b>	
<b>Value Statements</b>	
<b>Strategic Alignment</b>	
<b>Initial Estimations</b>	
<b>Risk Assessment</b>	
<b>Financial Information</b>	
<b>Project Implementation</b>	
Priority	0
Link to Implementation Project	<a href="https://rpcdemo.dev.ratlcore.ibm.com:9443/ccm/resource/itemOid/com.ibm.team.apl.IterationPlanRecord/_448oRGqBEEcQI08Dd2WHG">https://rpcdemo.dev.ratlcore.ibm.com:9443/ccm/resource/itemOid/com.ibm.team.apl.IterationPlanRecord/_448oRGqBEEcQI08Dd2WHG</a>
Implementation State	
Completeness (%)	0 %

At the bottom of the main content area, there are buttons for "Add Project", "Add Business Needs", "Add Folder", "Turn Into Folder", "Delete", and "Import Projects".

The footer of the application shows the IBM logo, the text "Rational software", and a search bar with the text "Find: ts Under Implementation".

## 3.6 Business need linked to work item in RTC

The screenshot displays the Rational Focal Point web application interface. The left sidebar shows a tree view of modules, with 'Business Needs' highlighted. The main content area shows a list of Business Needs, with '010: Automatic monitoring and alerts' selected. A modal window titled '87: Automatic monitoring and alerts' is open, showing details for a Work Item. The Work Item details include:

- General Information:** ID: 010, Title: Automatic monitoring and alerts, Description: Automatic monitoring and alerts on...
- Status and Planning:** Status: New, Resolution: Automatic monitoring and alerts. Effort: Estimated 930 hrs, Planned 0 hrs, Actual 0 hrs.
- Links:** Business Units: -, Application: Fraud Detection Tool, Projects: Financing factory, Supplemental Insurance.
- Quick Information:** Subscribers (1): FP, Related Artifacts (1).
- Description:** Automatic monitoring and alerts on suspect transactions is also important.

At the bottom of the interface, there is a search bar with the text 'ts Under Implementation' and a search button. The URL in the address bar is 'https://pcdemo.dev.ratcore.ibm.com:9443/ccm/resource/itemName/com.ibm.team.workitem.WorkItem/87'.

## 4.1 Project plan in RTC

The screenshot shows the IBM Rational Team Concert (RTC) web interface. The browser title is "Financing factory - Rational Team Concert - Mozilla Firefox: IBM Edition". The URL is [https://rpdemo.dev.ratcore.ibm.com:9443/ccm/web/projects/Financing factory#action=com.ibm.team.apt.viewPlan&id=\\_448oRGqbEeCqIO8Dd2WHHg](https://rpdemo.dev.ratcore.ibm.com:9443/ccm/web/projects/Financing%20factory#action=com.ibm.team.apt.viewPlan&id=_448oRGqbEeCqIO8Dd2WHHg). The page title is "Financing factory - Rational Team Co...". The main content area shows the "Financing factory" project plan details. The "Planned Items" tab is selected, and the view is set to "Work Breakdown and Schedule". A table of planned items is displayed, with columns for Actions, Summary, Owned By, Effective Estim, Constraint Type, Constraint Da, Predecessor, Id, and a Gantt chart. The Gantt chart shows a timeline from June 2011 to August 2011. The table contains the following data:

Actions	Summary	Owned By	Effective Estim	Constraint Type	Constraint Da	Predecessor	Id
	Automatic monitoring and alerts	Unassigned	--	--	--	--	87
	Change fund	Unassigned	--	--	--	--	88
	Client history	Unassigned	--	--	--	--	89
	Compare CD Rates with other Banking Providers and Onlir	Unassigned	--	--	--	--	90
	Component content	Unassigned	--	--	--	--	91
	Document and promote our security efforts	Unassigned	--	--	--	--	92

The Gantt chart shows a timeline from June 2011 to August 2011. The planned items are represented by bars in the Gantt chart, with dates ranging from June 29 to August 14, 2011. The interface also includes a search bar, a "Save" button, and a "Jazz" logo in the bottom right corner.

## 4.2 Import development tasks into plan

Financing factory - Rational Team Concert - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

https://rpcdemo.dev.ratcore.ibm.com:9443/ccm/web/projects/Financing factory#action=com.ibm.team.apt.viewPlan&id=\_448oRGqbEeCqI08Dd2WHg

Financing factory - Rational Team Concert - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

https://rpcdemo.dev.ratcore.ibm.com:9443/ccm/web/projects/Financing factory#action=com.ibm.team.apt.viewPlan&id=\_448oRGqbEeCqI08Dd2WHg

Financing factory - Rational Team Co...

Change and Configuration Management (/ccm)

Francis Parks

Search Work Items

Financing factory

Project Dashboards Work Items Plans Source Control Builds Reports

Auto-Save Save

Plan Details

Planned Items Links Snapshots Reso

View As: Work Breakdown and Schedule

Actions	Summary
	Automatic monitoring and alerts
	Change fund
	Client history
	Compare CD Rates with other
	Component content
	Document and promote our se

11 July 2011 August 2011

1 July 2011 August 2011

12 6/19 6/26 7/3 7/10 7/17 7/24 7/31 8/7 8/14 8/21 8/28

1 Select import file 2 3 4

Select import file

To import a Microsoft Project file, save it as an .xml file. Browse to and select the .xml file for the import.

File :\* c:\Demo\Project Tasks.xml Browse...

Plan start and end Date :\*

- Keep the date range as specified in iterations in the project area.
- Use the date range as specified in the XML file.
- Extend the date range to include the dates specified in the XML file.

< Back Next > Finish Cancel

## 4.3 Steps for importing tasks

**Import Microsoft Project XML file**

1 Select import file 2 3 4

### Select import file

To import a Microsoft Project file, save it as an .xml file. Browse to and select the .xml file for the import.

File: \*

Plan start and end Date: \*

- Keep the date range as specified in iterations in the project area.
- Use the date range as specified in the XML file.
- Extend the date range to include the dates specified in the XML file.

**Import Microsoft Project XML file**

1 2 Map tasks 3 4

### Map tasks

Map summary tasks and tasks in the import file to the available work item types in your project area.

External task type	Mapped work item type
Summary Task	Task
Task	Task

**Import Microsoft Project XML file**

1 2 3 Map resources 4

### Map resource

Map each resource in the import file with a user in your repository. The users you select will replace the resources assigned to the tasks in the import file.

External Resource	Mapped Resource
pm	Francis Parks
dev	Karthi Dakshin
lead	Arthur Ryman

**Import Microsoft Project XML file**

### Summary

Import successful.

Created 16 work item(s) for the iteration plan.

Explore the plan work breakdown structure in the Planned Items tab.

To add new work items, select the owner or the Unassigned container, and click the New Work Item icon.

To modify the work item details, click the work item.

## 4.4 Imported development tasks

Financing factory - Rational Team Concert - Mozilla Firefox: IBM Edition

https://rpdemo.dev.ratcore.ibm.com:9443/cm/web/projects/Financing%20factory#action=com.ibm.team.apt.viewPlan&id=\_448oRGqbEeCqIO8Dd2WHg

Financing factory - Rational Team Co...

Financing factory

Plan Details [Edit](#)

Planned Items [Links](#) [Snapshots](#) [Resources](#) [Notes](#)

View As: [Work Breakdown and Schedule](#)

Actions	Summary	Owned By	Effective Estim	Constraint Type	Constraint Da	Predecessor	Id	June 2011			July 2011			August 2011				
								29	6/5	6/12	6/19	6/26	7/3	7/10	7/17	7/24	7/31	8/7
	Automatic monitoring and alerts	Unassigned	--	--	--	--	87											
	Change fund	Unassigned	--	--	--	--	88											
	Client history	Unassigned	--	--	--	--	89											
	Compare CD Rates with other Banking Providers and Onlin	Unassigned	--	--	--	--	90											
	Component content	Unassigned	--	--	--	--	91											
	Document and promote our security efforts	Unassigned	--	--	--	--	92											
	fund management	Arthur Ryma	1 week	As Soon As Possib	--	--	127											
	Monitoring and alerts	Arthur Ryma	--	As Soon As Possib	--	--	128											
	Define component architecture	Arthur Ryma	1 week	As Soon As Possib	--	127: fund m	129											
	Specify the interfaces	Arthur Ryma	3 days	As Soon As Possib	--	129: Define	132											
	Produce Detailed Class Diagram	Karthi Daksl	2 days	As Soon As Possib	--	132: Specify	138											
	Compare CD Rates with other Banking Providers and Onlin	Arthur Ryma	--	As Soon As Possib	--	--	130											
	Produce Test Plan	Arthur Ryma	1 week	As Soon As Possib	--	127: fund m	131											
	Performance testing	Arthur Ryma	1 week	As Soon As Possib	--	136: Integral	137											
	Test Validations	Karthi Daksl	1 week	As Soon As Possib	--	136: Integral	141											
	Test main use cases	Karthi Daksl	1 week	As Soon As Possib	--	141: Test Va	142											

Transferring data from rpdemo.dev.ratcore.ibm.com...

1 Error en-US

## 4.5 Link tasks to parent business need

The screenshot shows the IBM Jazz web interface. The browser title is "Task 130: Compare CD Rates with other Banking Providers and Online - Rational Team Concert - Mozilla Firefox: IBM Edition". The URL is "https://rpdemo.dev.ratcore.ibm.com:9443/ccm/web/projects/Financing\_factory#action=com.ibm.team.workitem.viewWorkItem&id=130&tab=links".

The main page is titled "Financing factory" and shows a "Task 130" with the summary "Compare CD Rates with other Banking Providers and Online". The "Links" tab is active, showing a tree view of children tasks: 142: Test main use cases, 141: Test Validations, 131: Produce Test Plan, and 137: Performance testing. The "Add: Parent" button is highlighted with a red box.

An "Add Link: Parent - Select Work Item" dialog box is open. It shows the "Project Area" as "Financing factory" and the "Work Item Number or Words Contained in the Text" as "90". The "Matching Work Items" list shows one result: "90: Compare CD Rates with other Banking Providers and Online Providers", which is highlighted with a red box. The dialog also has "OK" and "Cancel" buttons.

The IBM logo is visible in the bottom left corner, and the "Jazz" logo is in the bottom right corner. The system tray at the bottom shows the date and time as "Apr 19, 2011 10:51 PM" and the language as "en-US".



## 4.6 Elaborated plan

Financing factory - Rational Team Concert - Mozilla Firefox: IBM Edition

File Edit View History Bookmarks Tools Help

ibm.com https://pcdemo.dev.ratcore.ibm.com:9443/cm/web/projects/Financing%20factory#action=com.ibm.team.apt.viewPlan&page=com.ibm.team.apt.web.ui.plannedItems

RTC IBM Integration Most Visited Problem loading page Getting Started Latest Headlines IBM Business Transfor... IBM Standard Softwar... IT Help Central Join World Community... IBM

Financing factory - Rational Tea... Task 143: Run beta program with client...

**Financing factory** [?] [Auto-Save] [Save]

Plan Details [Edit]

Planned Items Links Snapshots Resources Notes

View As: Work Breakdown and Schedule [Icons]

Actions	Summary	Owned By	Effective Estim	Constraint Type	Constraint Da	Predecessor	Id	June 2011			July 2011			August 2011					
								29	6/5	6/12	6/19	6/26	7/3	7/10	7/17	7/24	7/31	8/7	8/14
Automatic monitoring and alerts	fund management	Francis Pari	--	--	--	--	87	[Gantt bar]											
Change fund	Monitoring and alerts	Arthur Ryma	1 week	As Soon As Possib	--	--	127	[Gantt bar]											
	Define component architecture	Arthur Ryma	1 week	As Soon As Possib	--	127: fund m:	129	[Gantt bar]											
	Specify the interfaces	Arthur Ryma	3 days	As Soon As Possib	--	129: Define	132	[Gantt bar]											
	Produce Detailed Class Diagram	Karthi Daksl	1 week	As Soon As Possib	--	132: Specify	138	[Gantt bar]											
Client history	Run beta program with clients	Arthur Ryma	--	--	--	--	89	[Gantt bar]											
Compare CD Rates with other Banking Providers and Onlin	Compare CD Rates with other Banking Providers and Onlin	Francis Pari	3 days	As Soon As Possib	--	142: Test m:	143	[Gantt bar]											
	Compare CD Rates with other Banking Providers and Onlin	Karthi Daksl	--	--	--	--	90	[Gantt bar]											
	Produce Test Plan	Arthur Ryma	1 week	As Soon As Possib	--	138: Produc	131	[Gantt bar]											
	Performance testing	Arthur Ryma	1 week	As Soon As Possib	--	136: Integral	137	[Gantt bar]											
	Test Validations	Karthi Daksl	1 week	As Soon As Possib	--	136: Integral	141	[Gantt bar]											
	Test main use cases	Karthi Daksl	1 week	As Soon As Possib	--	141: Test Va	142	[Gantt bar]											
Component content		Arthur Ryma	--	--	--	--	91	[Gantt bar]											

Find: [ ] [Next] [Previous] [Highlight all] [Match case]

Done [Icons] en-US

## 5.1 Update project status

The screenshot shows the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is "http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP\_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C".

The application header includes "Rational Focal Point" and navigation links: "Workspaces | Home | Preferences | Admin | Help [Local Help Updater|Change Password] | Log Out". The breadcrumb trail is "Display > Projects Under Implementation".

The left sidebar contains a "Modules" tree with "Projects Under Implementation" selected. The main content area shows a tree view of "Projects (2/2)" with "Financing factory" selected. The "Current State" is "Approved for implementation" and "Transitions" include "Deliver", "Place on hold", and "Stop".

The "Financing factory" details are shown in a table:

General Information	
ID	140
Title	Financing factory
Description	
Type	Cost reduction
Portfolio	External Applications
Submitter	David
Proposal Owner	-
IT Analyst	Sam
Business Units	Operations
Comments	-

Below the table are sections for "Links", "Value Statements", "Initial Estimations", "Risk Assessment", and "Financial Information". At the bottom, there are buttons for "Add Project Proposal", "Add Business Need", and "Delete".

## 5.2 Imported development tasks

The screenshot displays the Rational Focal Point web application interface. The browser window title is "IT Portfolio Management Template - Original Demo - Rational Focal Point - Mozilla Firefox: IBM Edition". The URL is [http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP\\_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C](http://localhost:8080/fp/servlet/WorkSpaceController?file=/common/index.jsp&FP_projectid=1&KEY=B35CF8240DAC1032A5ED4AA42B6DF06C). The application shows a navigation menu on the left with categories like "Add", "Display", "Prioritize", "Visualize", and "Reports". The main content area displays a tree view of projects under "Projects (2/2)", including "Maintenance Program", "Financing factory", and "Enhancement of Fr". A red-bordered notification box in the center-right of the main area contains the following text:

**The project was successfully updated from Jazz**  
The project was successfully updated from Jazz

## 5.3 Updated business need status

The screenshot displays the Rational Focal Point interface for IT Portfolio Management. The main view is titled "Business Needs" and shows a list of 37 items. The item "010: Automatic monitoring and alerts" is selected and highlighted with a red box. The details for this item are shown in the right-hand pane.

**Business Needs List:**

- 010: Automatic monitoring and alerts
- 011: Change fund
- 012: Client history
- 013: Compare CD Rates with oth
- 014: Component content
- 015: Document and promote our
- 016: Early testing of upgrades
- 017: Education Financial Plannin
- 018: Electronic Data Interchange
- 019: eMail Alerts
- 020: email notification of custome
- 021: Employee Education Portal
- 022: Employee Web Access to th
- 023: Encoding
- 024: eNews Letter
- 025: Enforce authorized use of int
- 026: eServices
- 027: eStatements
- 028: Evaluation of financial oppor
- 029: Flexible time sheet entry
- 030: General Component Base
- 031: Graphs for portfolio
- 032: Accounting service
- 033: History log for SMS traffic
- 034: Identity Protection
- 035: Improved analysis
- 036: Instant messaging
- 037: Integration with risk manage

**Automatic monitoring and alerts Details:**

- General Information**
- Status and Planning**
  - State: Planned
  - Work Item State: New
  - Priority: 10
  - Completeness (%): 0 %
  - Responsible: -
  - Target Start Date: 4/8/12
  - Planned Start Date: 6/1/11
  - Actual Start Date: -
  - Target End Date: 6/10/12
  - Planned End Date: 6/7/11
  - Actual End Date: -
  - Snapshot Date: 4/19/11
- Effort**
  - Estimated Effort: 930 hrs
  - Planned Effort: 40 hrs
  - Actual Effort: 0 hrs
  - Actual vs Planned: [Progress indicator]
- Links**

## 5.4 Updated project status

The screenshot shows the Rational Focal Point interface in a Mozilla Firefox browser. The main content area displays the details for a project named 'Financing factory' under the 'Maintenance Program' folder. The project details are as follows:

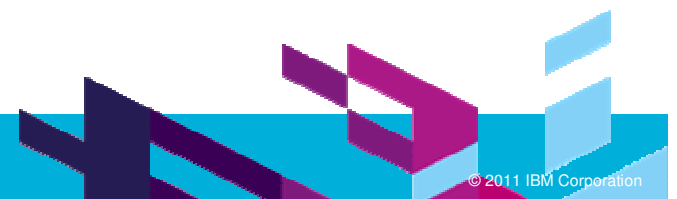
Field	Value
Duration	-504 months
Target Start Date	6/1/11
Planned Start Date	6/1/11
Actual Start Date	-
Target Implementation Date	-
Planned Implementation Date	-
Actual Implementation Date	-
Target End Date	8/31/11
Planned End Date	8/24/11
Actual End Date	-
Target Delivery Date	-
Planned Delivery Date	-
Actual Delivery Date	-
Snapshot Date	4/19/11

The interface includes a left-hand navigation pane with 'Projects' selected, a central tree view showing the project hierarchy, and a right-hand pane with various project details and a 'Backlog Handling' section. The bottom of the browser window shows the search bar with 'projects under' and the status 'Done'.

# QUESTIONS



[www.ibm/software/rational](http://www.ibm/software/rational)



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