Getting Started with Gatherspace

Gatherspace is a powerful hosted requirements management and use case tool for managing and sharing software requirements. It frees you to focus on your requirements without concern for upgrades, infrastructure, and maintenance.

This Quick Start Guide is intended to give you assistance in the fundamentals of setting up and using your Gatherspace.

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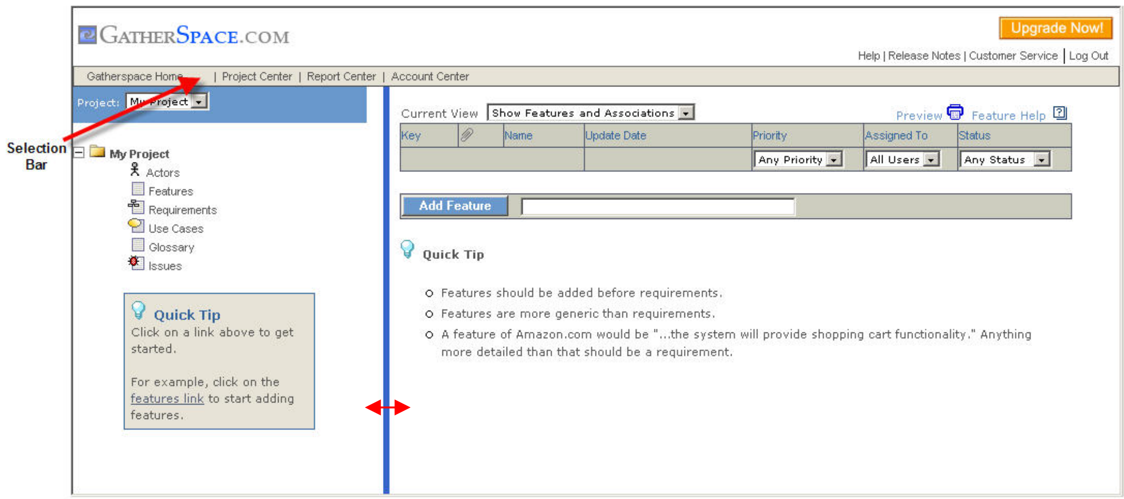
Overview

Whether you begin with a free trial or a paid account, your opening screen will appear as shown below.



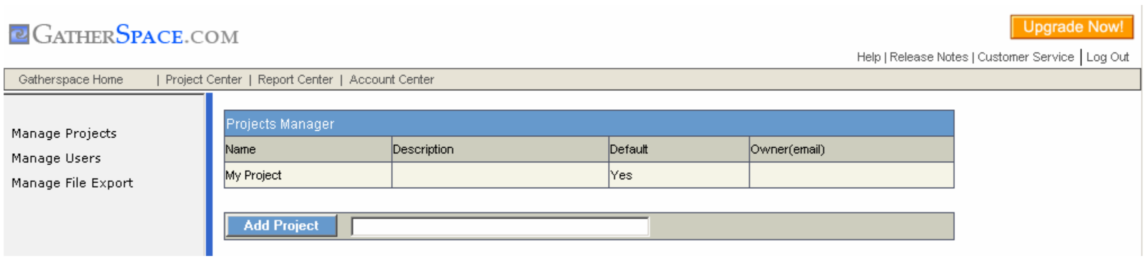
This screen is the Home Page for your Gatherspace. Like most screens, it is divided into two main sections, a left pane and right pane. Above the two panes is a Selection Bar from which you can choose the aspect of your Gatherspace that you want to see – Home, Project, Report or Account. When **Gatherspace Home** is selected (as shown above), the left pane displays a hierarchy of Product Specifications and Reports (Reports appear below the Product Specifications after you define your project).

Above the left pane is a pull-down menu from which you can select your projects, if you have more than one. The right pane displays the features of your project (unless Actors, Requirements or another choice is made in the left pane). You can enlarge either pane by clicking on the blue line between them and dragging it left or right, illustrated by the red arrows above.

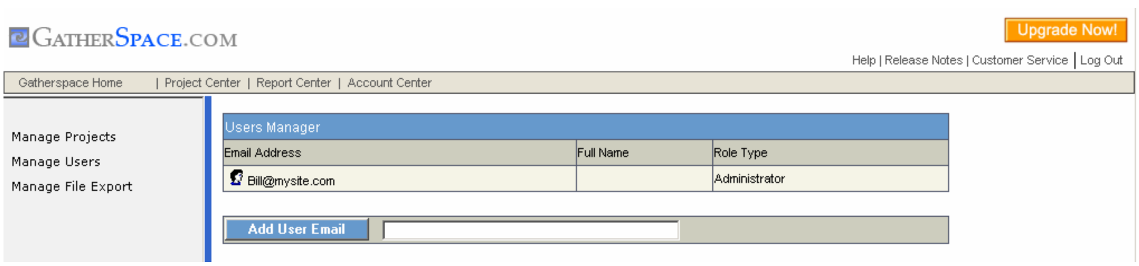
How do I get started?

Set up users

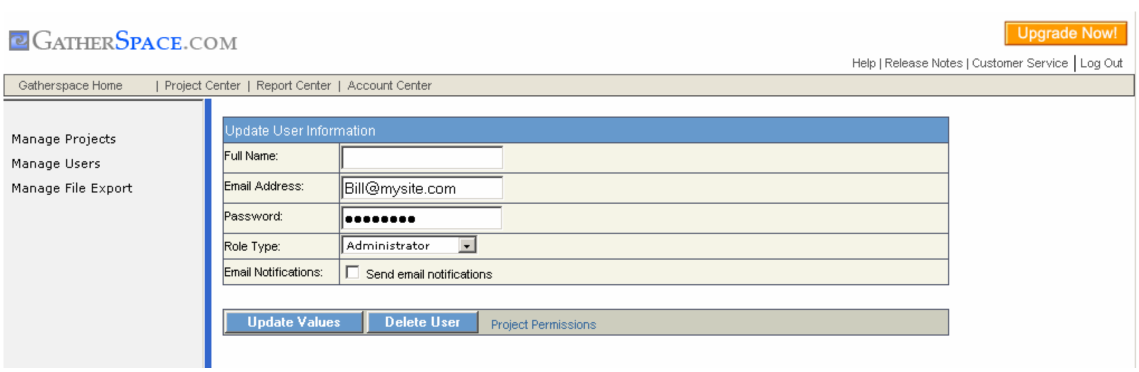
1 Start by setting up at least one user for your Gatherspace. Click ***Project Center*** on the Selection Bar.



2 Click ***Manage Users***.



3 Click the email address which appears.



If you are using the free trial, you are limited to one user, employing the email address and password you used when you signed up. The role of this user should remain as Administrator so that you will be able to make any necessary account changes.

4 Enter the full name for the displayed email address and password user.

5 Check the 'Send email notifications' box to have emails sent to the email address shown.

6 Click ***Update Values*** to accept the information shown.

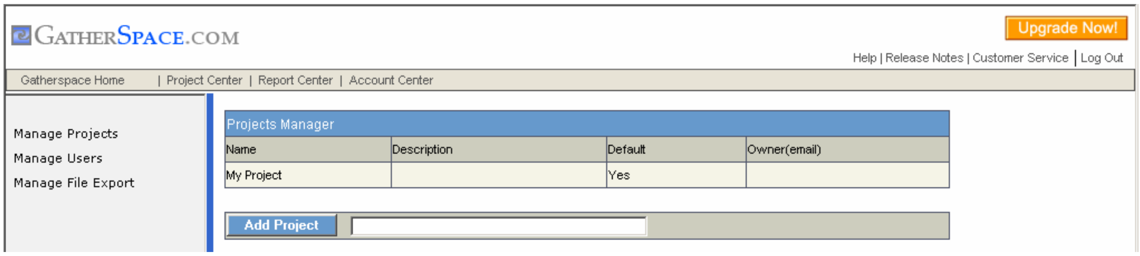
7 If you have a paid account, you may set up additional users by entering a new email in the 'Add User Email' box and clicking ***Add User Email***. Enter other information about the user as described above. These users may be assigned roles as Read Only or Read/Write, as well as Administrator.

TIP

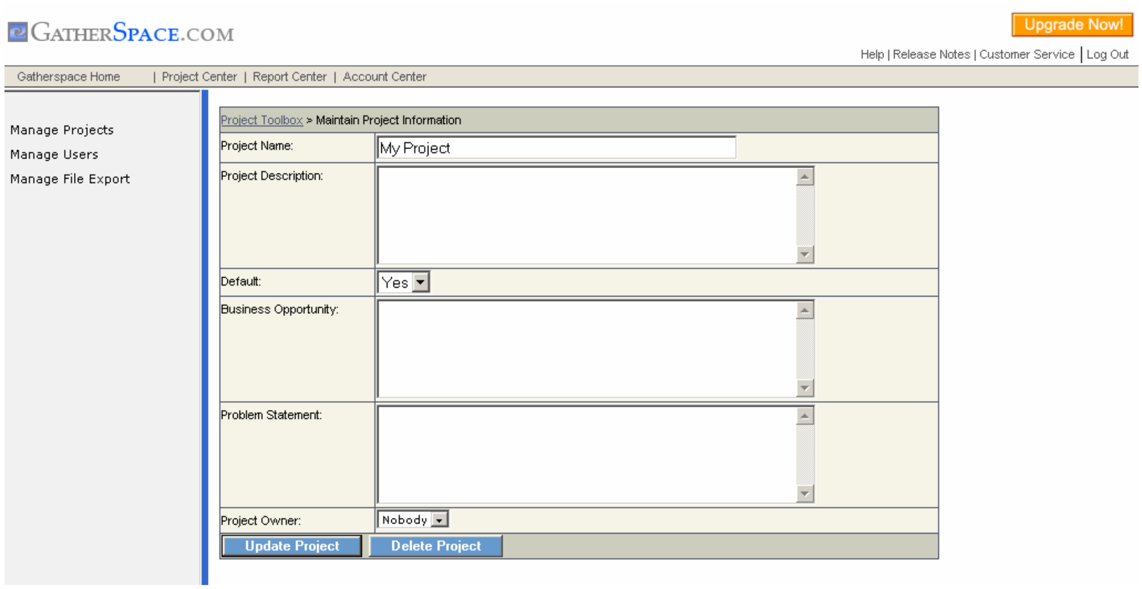
It is wise to carefully think through what role you assign to each user. Administrator privileges should be assigned only to those who will need to make basic changes to your Gatherspace. Read/Write roles should be assigned to all who will be making changes to your requirements. Others should be assigned Read Only roles.

Name your project

1 To give your first project a name, click ***Project Center*** on the Selection Bar.



2 Click ***My Project*** appearing under “Name” in the Projects Manager.



3 Change the ‘My Project’ name to the project name of your choice.

4 Enter a brief description of your project in the Project Description box.

You can come back and change any information on this screen at a later time, so if you are not sure what you want to enter, just leave the box blank.

5 Leave the Default selection set at “Yes.” When you have multiple projects, you can set the default to “Yes” for the project that you want your Gatherspace to automatically open to.

6 The Business Opportunity and Problem Statement boxes allow you to enter information about your project – such as what role your project can have in expanding your business and the problem your project can solve. Enter information now or leave it for later.

7 Click the pull-down arrow beside ‘Project Owner’ and select the owner you want to assign this owner to.

8 Click ***Update Project*** when your entries are complete.

NOTE

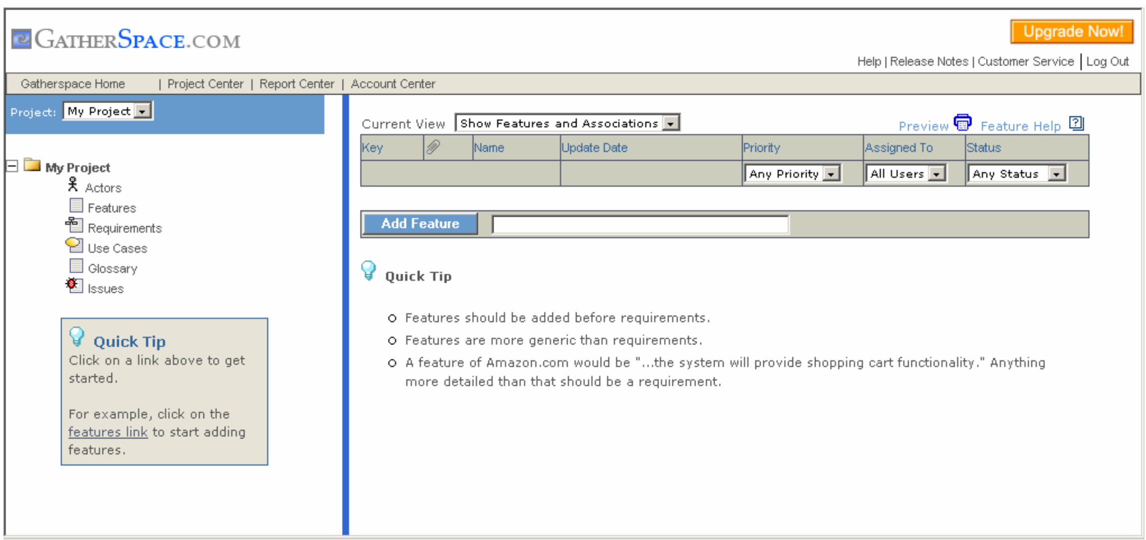
If you are using the free trial, you are limited to one project.

Add features

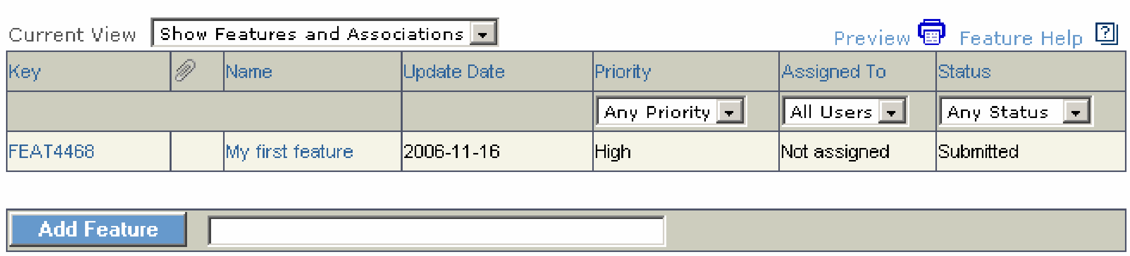
Features are the beginning point in constructing your project specifications. A **feature** is a simple description of something the system will do to solve the problem at hand. After some features have been defined, **requirements** can be added. A **requirement** is a description of how a **feature** is carried out. For example, a **feature** of an online bookstore might be to provide shopping cart functionality. Some **requirements** for that shopping cart might be to allow items to be placed in the cart, items to be removed from the cart and for the cart to be cleared of all items. It is important to understand the difference between a feature and a requirement before beginning to add features. Features are the top level of project definition. Requirements support or supplement features.

If you find that your feature is long and detailed, chances are it should be considered a requirement and not a feature.

1 Click ***Gatherspace Home***.

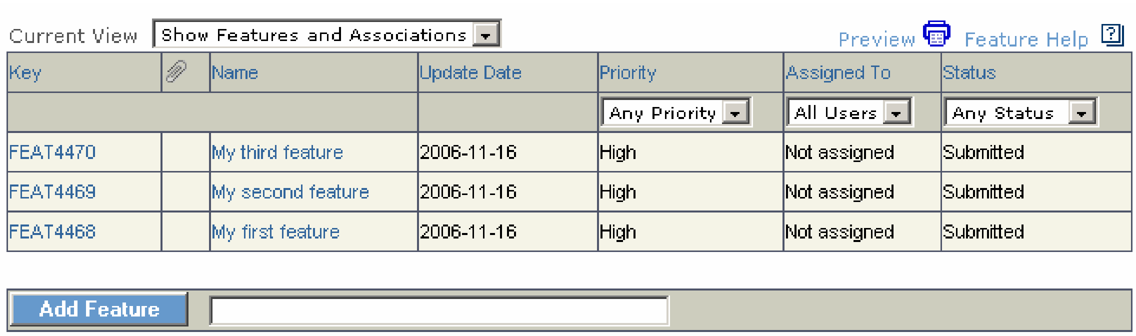


2 Enter the name of your feature in the box beside ‘Add Feature.’ A description of the feature will be added later.

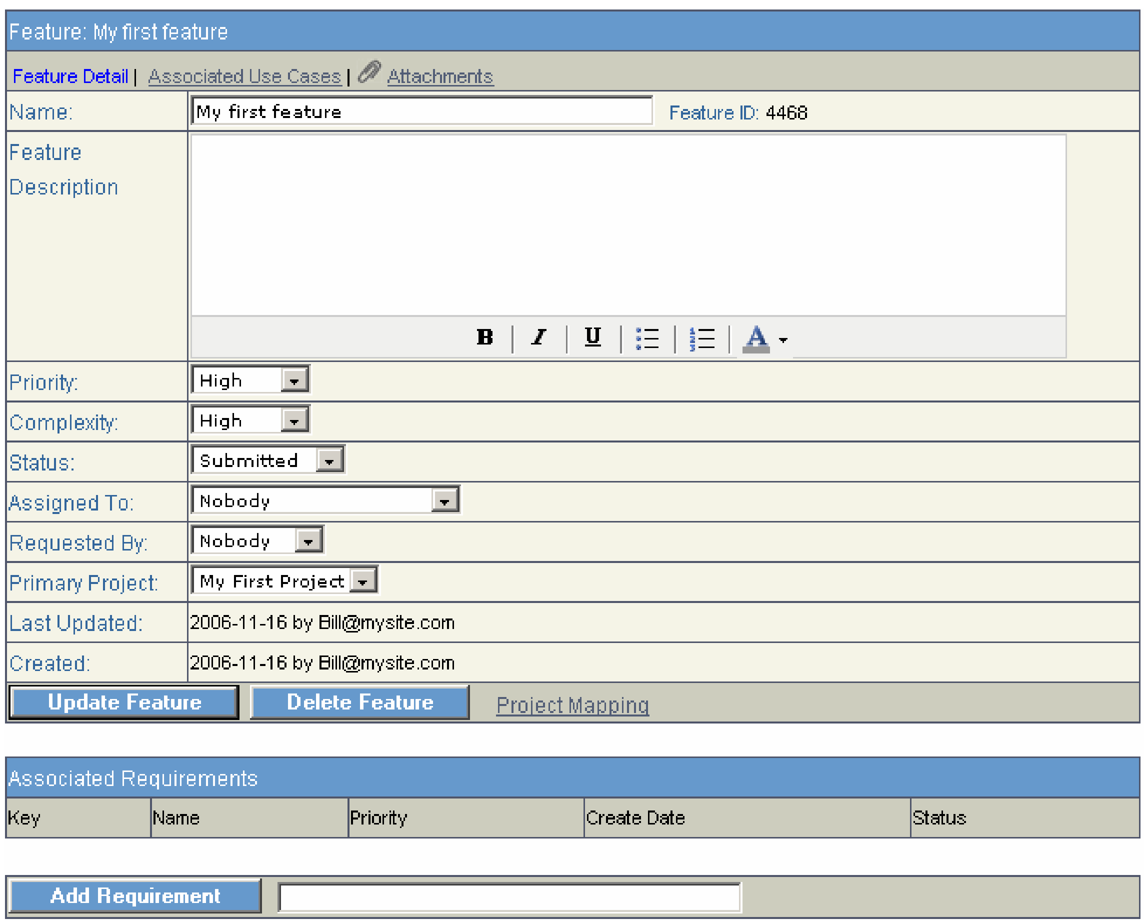


3 Click ***Add Feature***.

4 Repeat steps 2 and 3 above for other features you want to add.



5 After features have been added, descriptions for each feature may be added, along with other details regarding the feature. Click the **Key** or **Name** for any feature to open the Feature Detail screen.



5 Enter a description of the feature in the box provided. Text formatting controls are provided below the box so you can add bolding, special font colors, etc.

Assign the appropriate Priority and Complexity for this feature.

Assign the proper Status. Generally, when a feature is first established, it would be assigned a ‘Submitted’ status, but you can apply one of the other status levels according to the process your organization will use.

You may indicate ‘Assigned To:’ and ‘Requested By:’ individuals as appropriate.

If this feature is associated with more than one project (see Project Mapping below), you may indicate the primary project this feature is associated with.

Click ***Update Feature*** when complete.

6 **Project Mapping** – click this selection at the bottom of the Feature Detail screen to associate (map) a feature to an additional project.

At least one additional project must exist to apply Project Mapping.

Map Feature to Additional Projects		
Name	Description	Select
ATM Machine	The ABC corp will build a prototype ATM machine bu...	☐
Darwin	Data fulfillment engine ...	☑
Gatherspace	Web site and application	☑
General	adsfasdf	☐
Knowledge Management	Toyotas knowledge base customer service system	☐
MySpace Enhancements	New myspace enhancements for improved reporting an...	☐
MySpace Phase II	The purpose of the next phase of the Myspace proje...	☐
MySpaceCingular Integration		☐
ThreeSpot Improvements		☐
TonyHawk		☐
TonyHawkWAP		☐
Update Feature		

7 Check the boxes in the right ‘Select’ column for all projects you want to map this feature to. Click ***Update Feature***. The Feature Detail screen for this feature will return.

8 **Feature Views** – whenever features for a project are displayed (by clicking Features in the Project Specifications list), a choice of views is available. The Current View is shown in the pull-down selection box at the top of the screen, as shown below.

Current View: Show Features Only — Preview — Feature Help

Key		Name	Update Date	Priority	Assigned To	Status
				Any Priority	All Users	Any Status
FEAT4519		(System logging)	2006-11-20	High	Not assigned	Submitted
FEAT2599		System will provide customer service fun...	2006-11-20	High	Not assigned	Submitted
FEAT17		Marketing upsell after purchase	2006-09-05	High	Not assigned	Released
FEAT15		Purchase books online	2006-08-24	High	darrenjlevy@gmail.com	Submitted
FEAT14		Browse books online	2006-09-05	Medium	Not assigned	Cancelled
FEAT13		Shopping Cart Functionality	2006-06-07	High	Not assigned	Submitted

'Show Features Only' displays only features in the list. If 'Show Features and Associations' is selected, requirements and use cases associated with each feature are displayed under that feature as well, as shown below (a partial list is shown). Select the view that best helps you see the project detail you need.

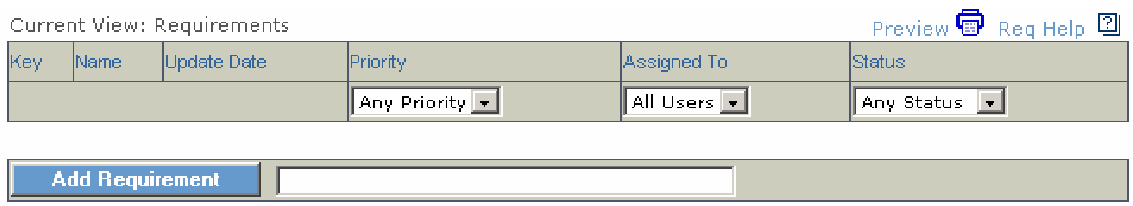
Current View: Show Features and Associations — Preview — Feature Help

Key		Name	Update Date	Priority	Assigned To	Status
				Any Priority	All Users	Any Status
FEAT4519		(System logging)	2006-11-20	High	Not assigned	Submitted
FEAT2599		System will provide customer service fun...	2006-11-20	High	Not assigned	Submitted
UC4727		Pick up CSR (customer service requests)				
UC4728		Send emails back to the customer				
FEAT17		Marketing upsell after purchase	2006-09-05	High	Not assigned	Released
SR512		Change quantities in basket				
UC52		Sends out books				

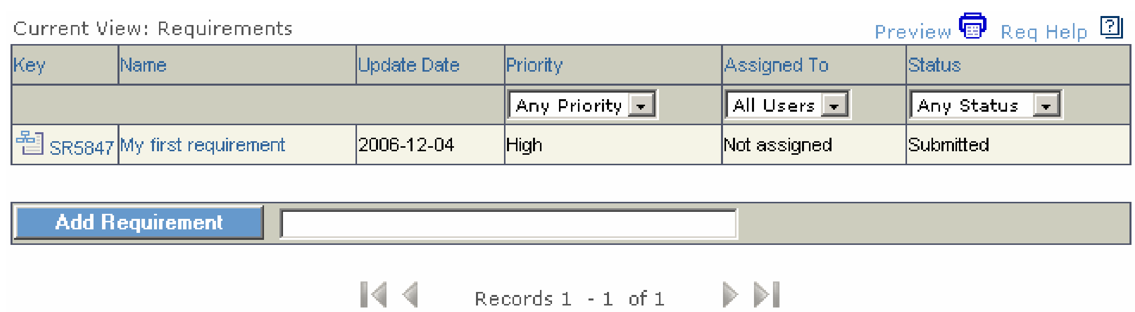
Add requirements

Requirements, as noted under ‘Add Features,’ exist to support or supplement features. A requirement is a description of how a feature is carried out. After features have been created, requirements can be added to support them.

1 Click ***Requirements*** in your Project Specifications list.

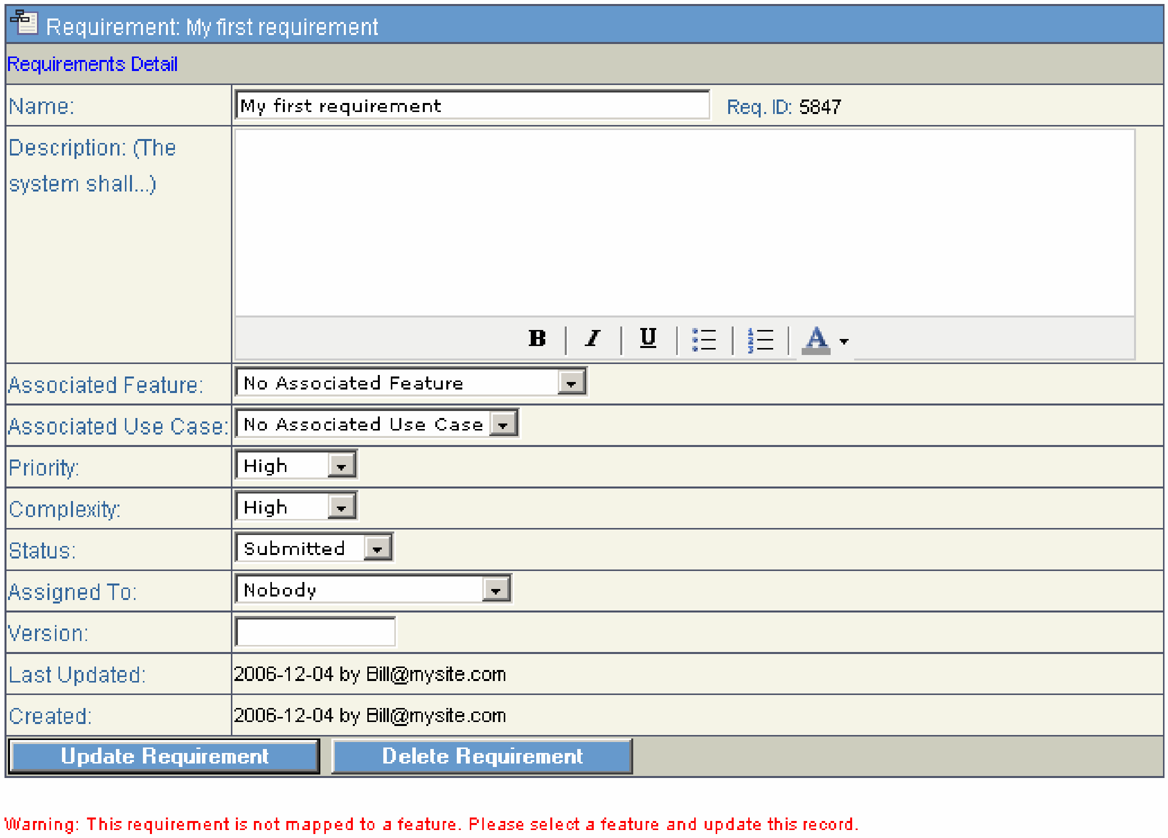


2 Enter your first requirement in the box and click ***Add Requirement***.



3 Enter additional requirements as described above.

4 All requirements must be mapped to a feature. To perform this step, click the ***Key*** or **Name** for any requirement.



5 Enter a description of the requirement in the box provided. A description should be of the form of “The system shall…” to properly describe the requirement. Text formatting controls are provided below the box so you can add bolding, special font colors, etc.

Associate this requirement to a feature by clicking the pull-down arrow beside ‘Associated Feature:’ and selecting the feature.

If use cases have been created, you may also associate this requirement to a use case by clicking the pull-down arrow beside ‘Associated Use Case:’ and selecting the use case.

Assign the appropriate Priority and Complexity for this feature.

Assign the proper Status. Generally, when a requirement is first established, it would be assigned a ‘Submitted’ status, but you can apply one of the other status levels according to the process your organization will use.

You may indicate this requirement is ‘Assigned To:’ an individual as appropriate.

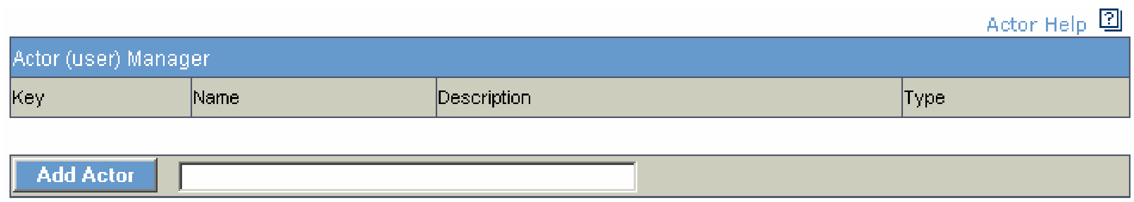
You may also enter a version designation to identify this requirement.

Click ***Update Requirement*** when complete.

Establish Actors

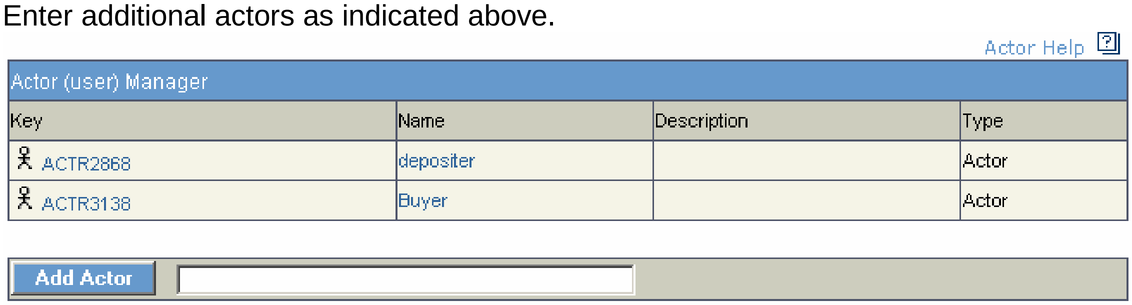
Actors are not specific people (such as Bill or Jan), but are roles which may be fulfilled by people or other entities interacting with (using) your system. Actors fulfill their roles to achieve desired goals. For example, if there is an actor called "Customer Service Agent", the actor goals could be, (1) Answer customer service calls, (2) Submit customer service tickets into system, (3) Monitor customer service queue. Note that the system itself is not entered as an actor.

1 Click ***Actors*** in your Project Specifications list.

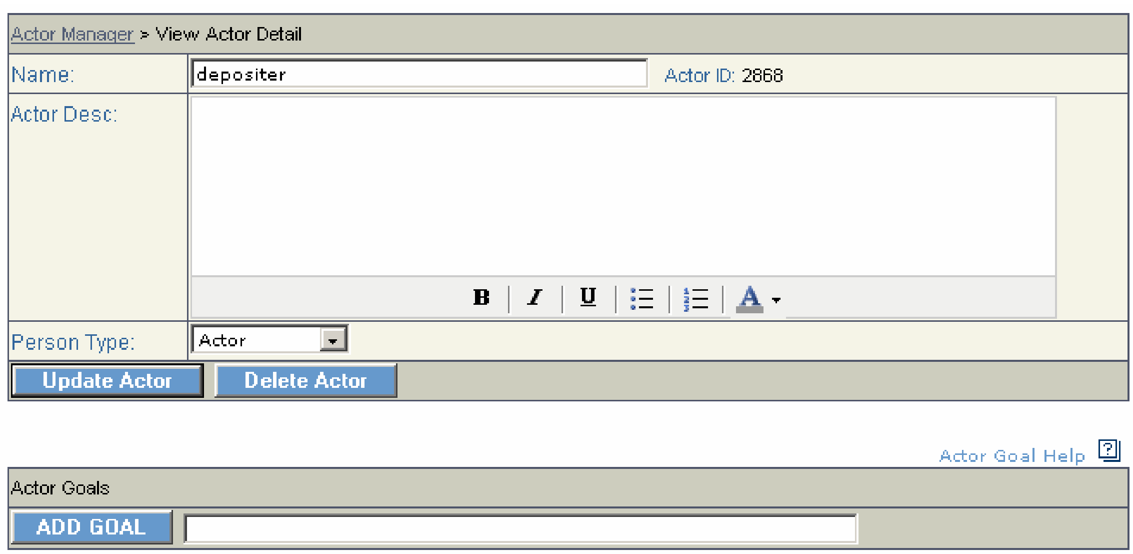


2 Enter your first actor in the box and click ***Add Actor***. Remember, the actor designation is not a person but a role, such as buyer or seller.

3 Enter additional actors as indicated above.



4 Goals and additional actor information can be entered by clicking on the **Key** for any actor.

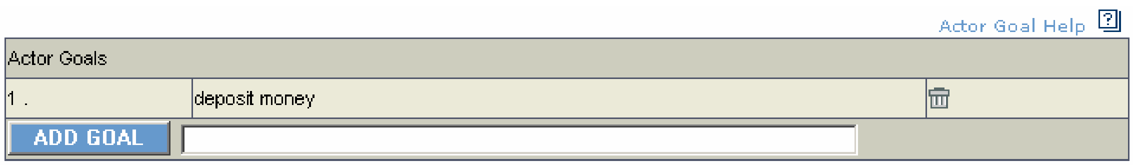


5 Enter a description for the selected actor. Text formatting controls are provided below the box so you can add bolding, special font colors, etc.

The Person Type may be selected by clicking the pull-down arrow. In addition to Actor, you may choose Stakeholder or System. A Stakeholder is someone who has an interest in (and is affected by) the project system but is not an actual user (actor). The System choice represents some system separate from your project system but which interacts with your system in its normal operation.

Click ***Update Actor*** when these selections are complete.

6 The same screen allows you to enter goals for the selected actor. Enter a goal and click ***Add Goal***.



7 Add additional goals for this actor in the same manner.

Establish Use Cases

When an actor (user) interacts with your system to achieve a goal, a use case is established. A use case can be thought of as simply one of the ways your system is used – a case of use, like an online bookstore customer placing a book in the shopping cart. Since there can be many actors pursuing several goals, there are usually many use cases associated with any system project. By accumulating all the use cases, the function of your system is fully described. As we will see later, these use cases are automatically made available in graphic form as well.

1 Click ***Use Cases*** in your Project Specifications list.

Current View: Use Cases — Use Case Help

ID	Use Case	Update Date	Actor	Priority	Status
			Show All Actors	Any	Any Status

Add Use Case

2 Enter the first use case in the box and click ***Add Use Case***. Since a use case is an example of what a user does when interacting with your system, it should be stated in the form of an action, like 'Put books in shopping cart.'

NOTE

Each use case must be associated with an actor (user). But this will be done later, so in this step, just enter the use case itself.

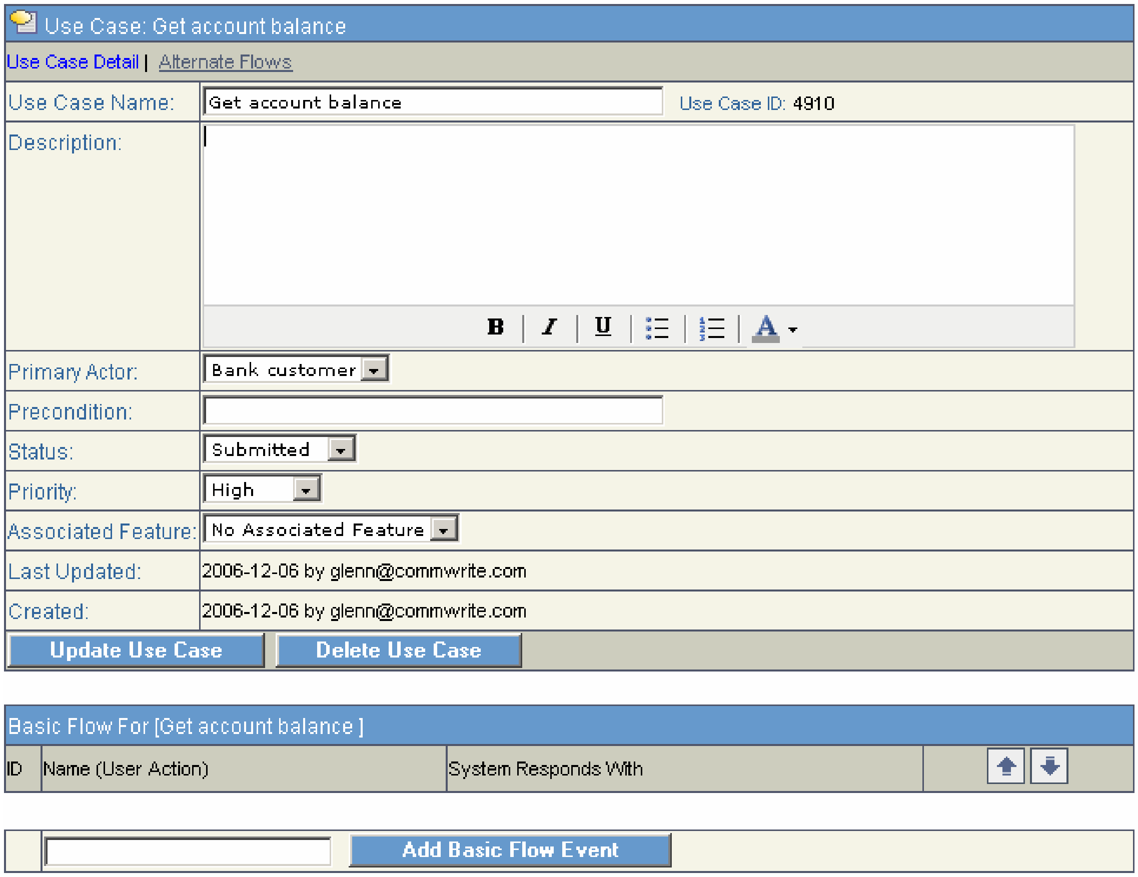
3 Enter additional use cases as indicated above.

Current View: Use Cases — Use Case Help

ID	Use Case	Update Date	Actor	Priority	Status
			Show All Actors	Any	Any Status
UC2084	Get account balance	2006-06-11	Bank customer	High	Submitted
UC2083	System provides receipt	2006-06-11	Bank customer	High	Submitted
UC2082	Customer withdraws quickcash	2006-12-07	Bank customer	High	Submitted

Add Use Case

4 Enter details of a use case such as actor assignment by clicking any use case or its ID number.



5 Enter a description for this use case.

Assign a primary actor by clicking the pull-down arrow and selecting an actor.

Enter a precondition, if appropriate. A precondition is some other action that must take place before this use case can happen.

Assign the appropriate Status and Priority for this use case.

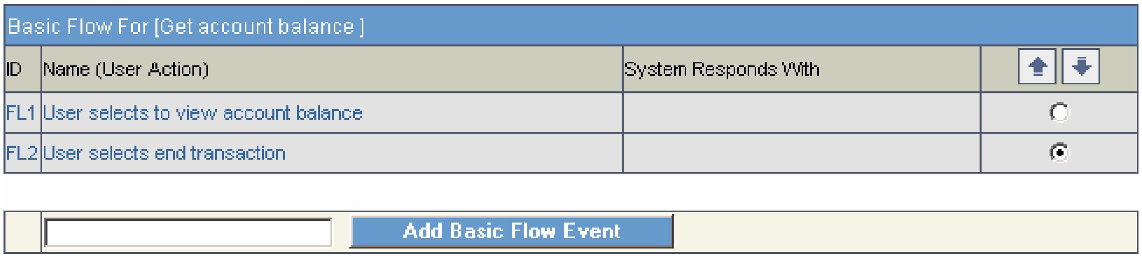
Associate a feature with this use case if appropriate, by clicking the pull-down arrow and selecting the feature.

Click ***Update Use Case*** when the entries are complete.

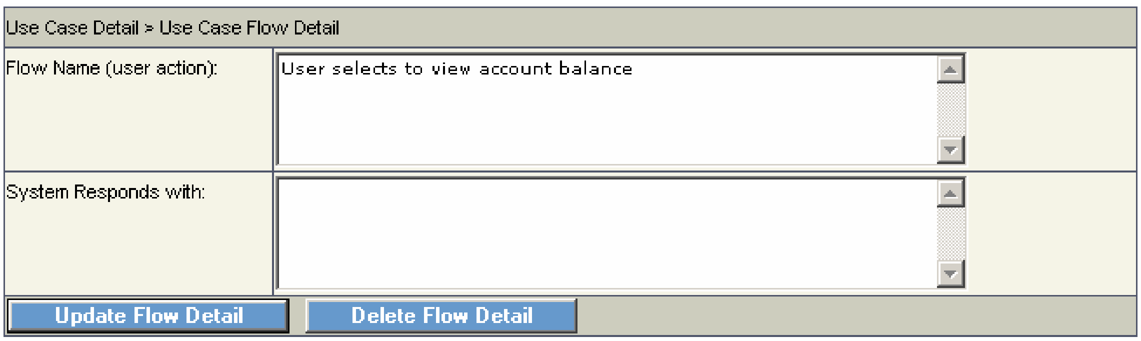
6 **Basic Flows** – for each use case (each interaction of a user with the system) there may be several system responses. The responses that would normally occur are called Basic Flows. For example, for the use case of a bank customer getting an account balance from an ATM machine, some normal flows might be to ‘select to view the account balance’ or ‘select to end the transaction.’ (Some unusual responses called Alternate Flows may also occur and are described later. Both need to be entered to fully describe the system.)

A basic flow for any use case can be entered in the box at the bottom of the use case detail screen, shown above in step 4. Enter the basic flow and click ***Add Basic Flow***

Event. Additional flows can be added in the same way. As they are entered, each flow is automatically assigned an ID number.

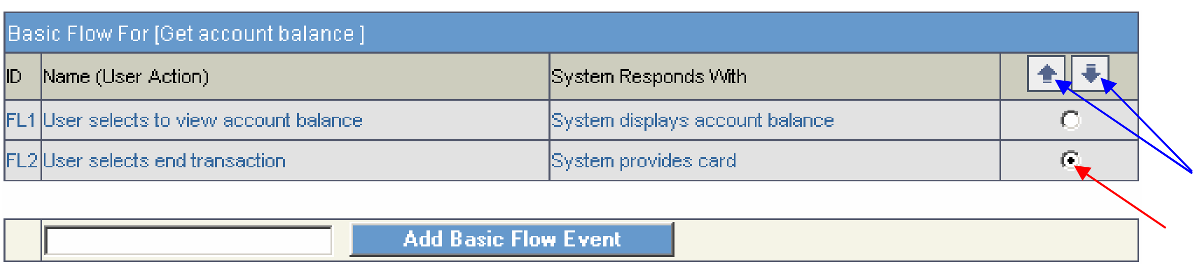


7 The Basic Flow you have entered defines the user input, but to complete the flow it is also necessary to record how the system responds. To add this response information, click on the ID or Name for any basic flow.



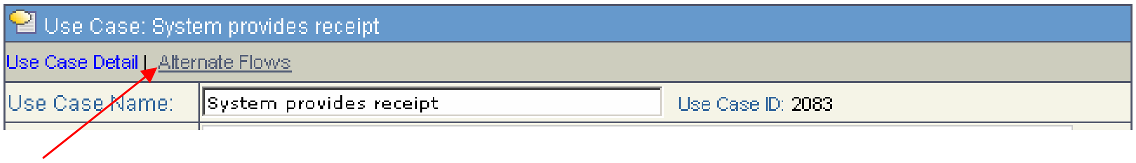
Enter the system response and click ***Update Flow Detail***.

8 Repeat for each basic flow until all basic flows for this use case have been described.

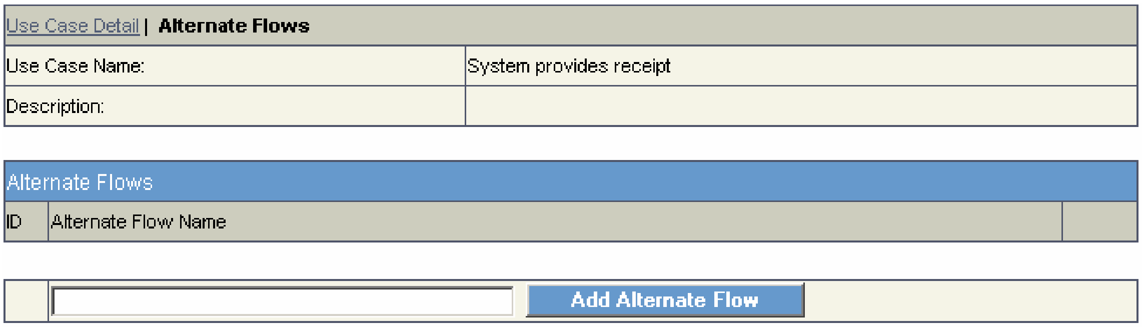


Flow list organization – when several basic flows have been entered, you may want to organize the list in some particular order for ease of use. To do so, select a flow you want to move up or down by clicking in the circle at the right-hand end of the row (red arrow above), then click the up or down arrow to move the flow (blue arrows above).

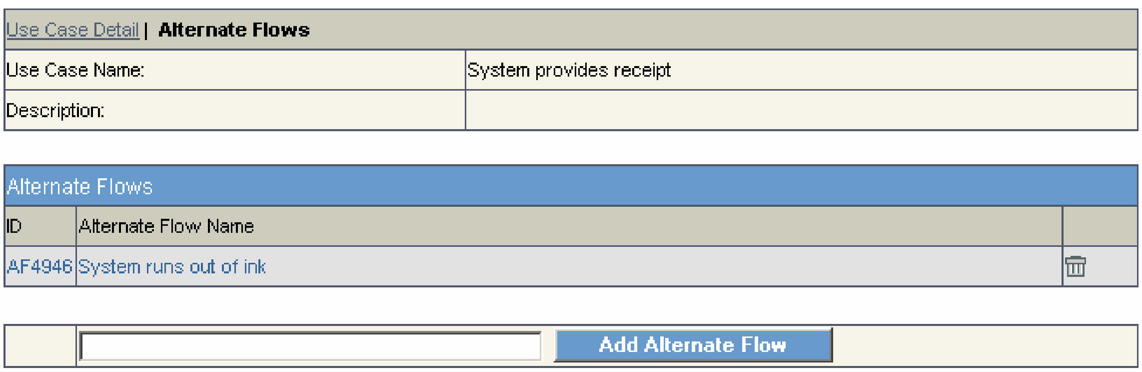
9 **Alternate Flows** – a complete system response to a user's inputs must include unusual events. For the ATM example and the 'System provides receipt' use case, the system could run out of ink and be unable to provide a receipt. Such unusual events are called Alternate Flows and must be entered along with the corresponding system response. To enter an alternate flow for any use case, open the use case by clicking its ID or name.



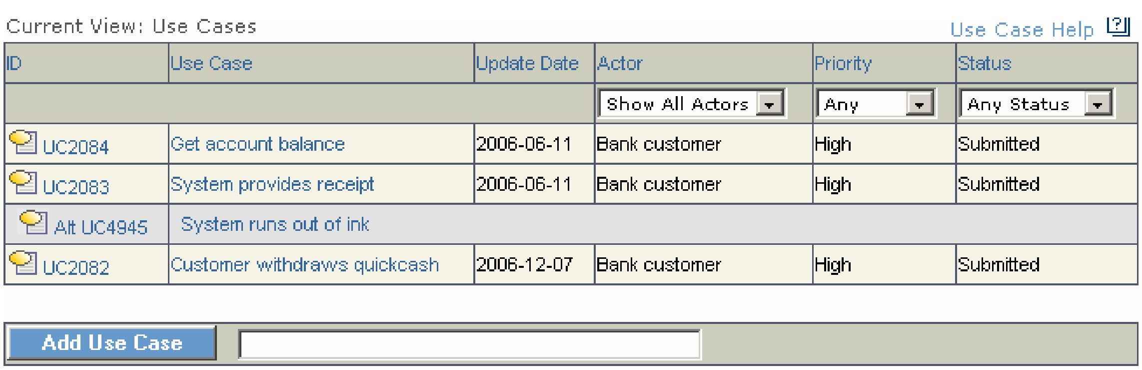
10 Click ***Alternate Flows*** which appears at the top of the use case detail screen (red arrow above).



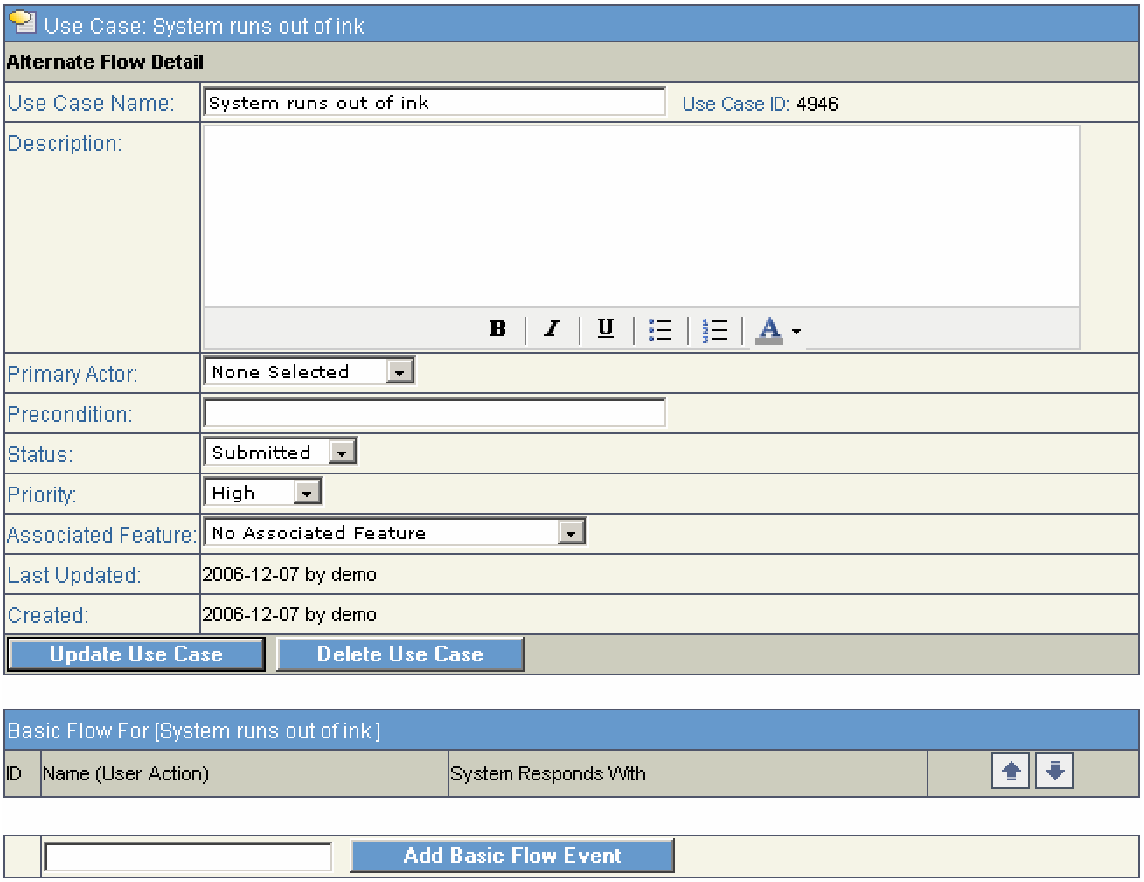
11 Enter the alternate flow in the box and click ***Add Alternate Flow***. Enter additional alternate flows for this use case as necessary to fully describe it.



12 When you enter an **alternate flow**, it is automatically assigned as an **alternate use case** and appears indented in the list of use cases below the main use case it is associated with. For example, see the alternate use case ‘Alt UC4945,’ shown below.



13 An alternate use case, like main use cases, should be described, an actor assigned, etc. To do this, click the alternate use case ID or name.



14 Enter the description, assign the actor and complete the other fields as was done for a main use case. Click **Update Use Case** when complete.

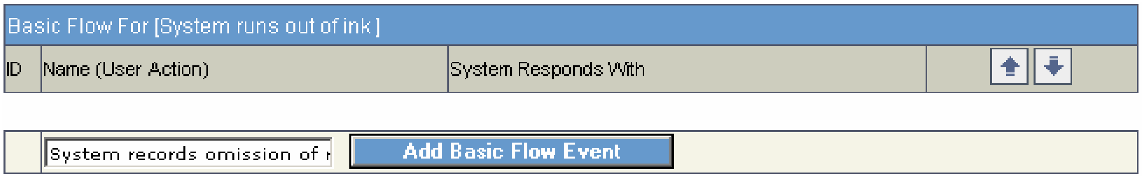
15 When an alternate use case has been defined, its basic flows should be entered. From the use case list click the alternate use case to display the Alternate Flow Detail screen (as shown in step 13 above). Enter the basic flow in the box at the bottom, then click ***Add Basic Flow Event***.

NOTE

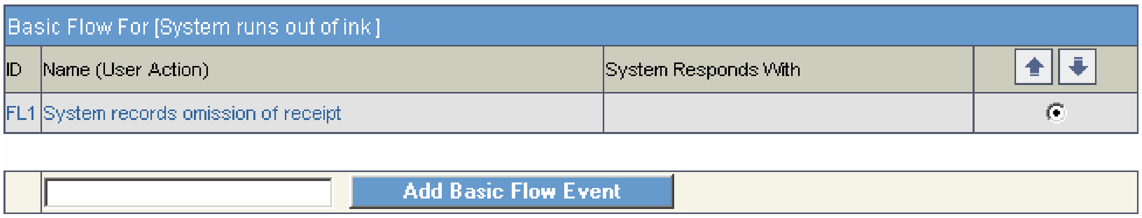
It may seem strange for an alternate use case to have basic flow events, since we made a distinction between a basic flow and alternate flow. But any use case, main or alternate, has a normal set of user actions and system responses which become the basic flows for that use case.

16 Often basic flows involve one or more system responses without corresponding user actions. In that case, enter the system response as the basic flow event, then on the flow detail screen, move the system response to its correct box and place a dash (-) in the user action box. An example is shown below.

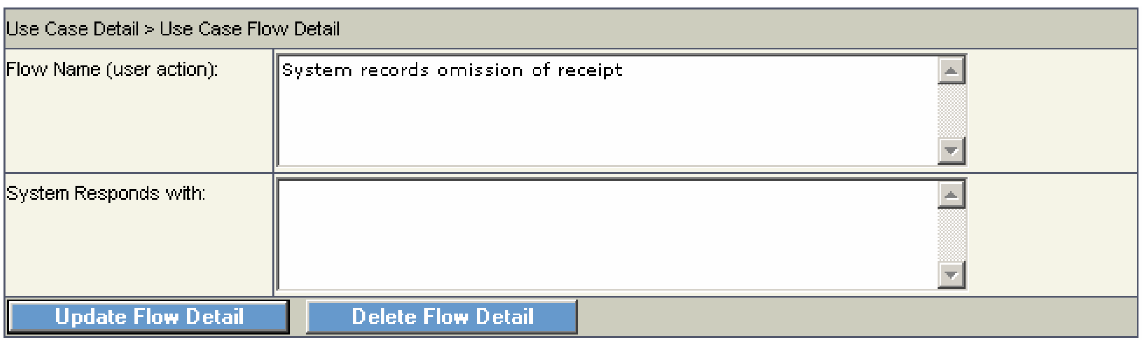
Enter the basic flow event ‘System records omission of receipt.’



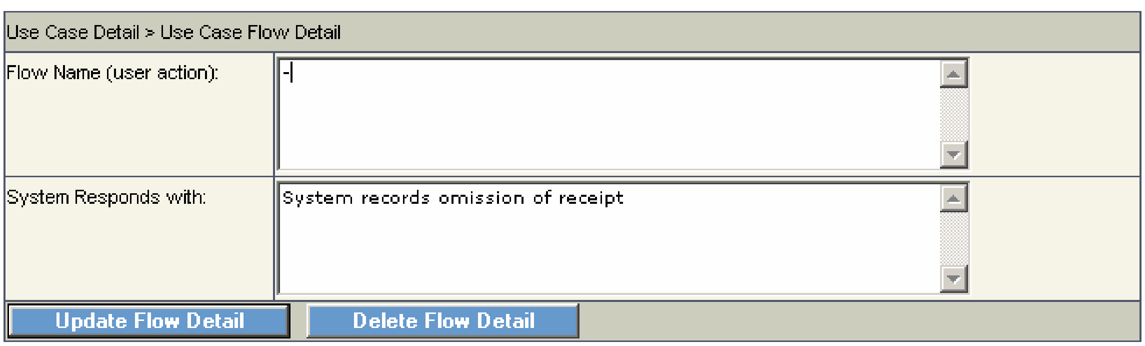
Click ***Add Basic Flow Event***.



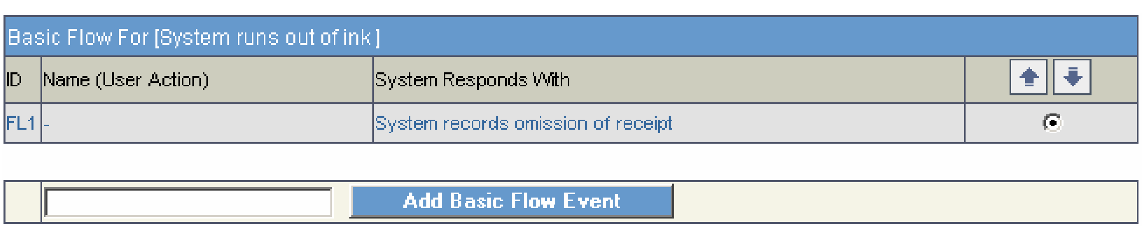
Click the ID or name.



Move the system response to the bottom box and place a dash in the top box.



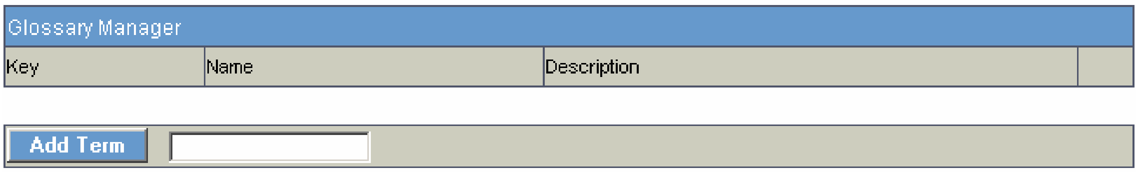
Click ***Update Flow Detail***.



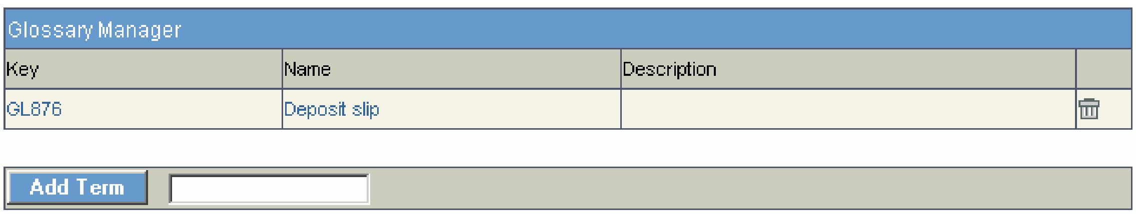
Create a Glossary

A project glossary allows you to define and explain terms which are used in the project requirements. This can be particularly helpful when unique terminology or business slang is used in describing this project. The glossary list will appear at the bottom of the completed Project Vision & Requirements document.

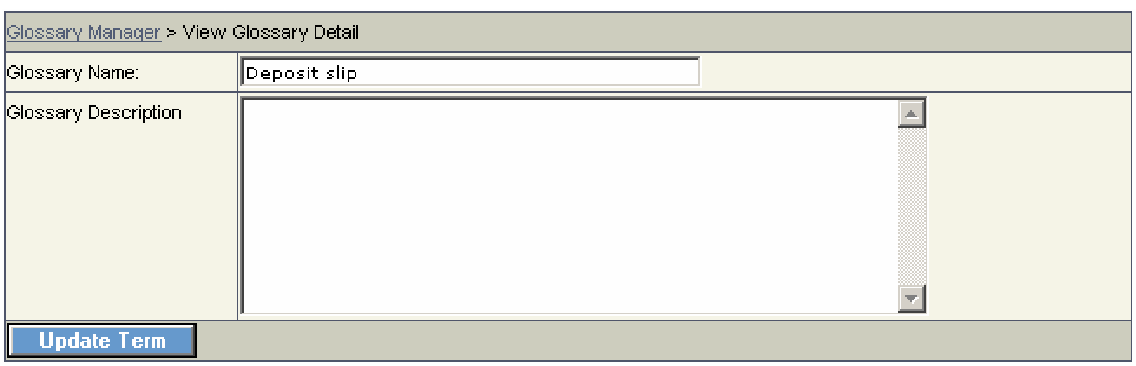
1 Click ***Glossary*** on the Project Details list.



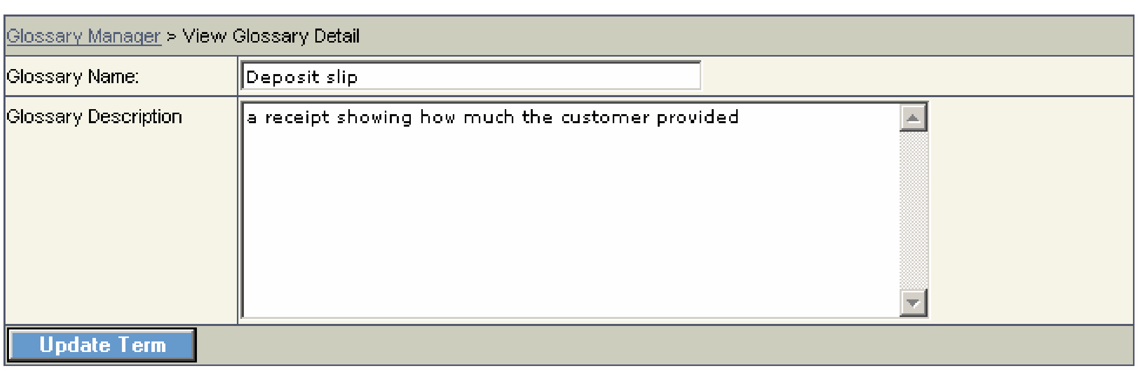
2 Enter a glossary term in the box and click ***Add Term***.



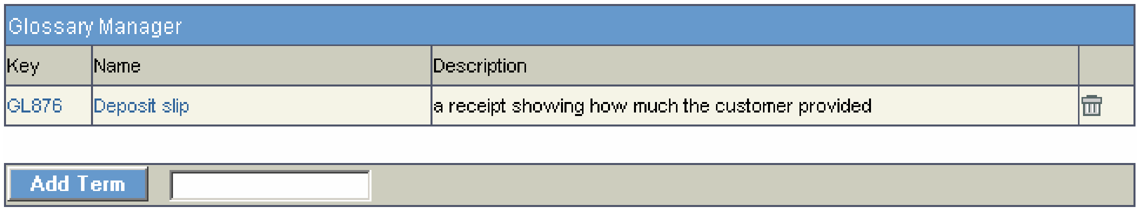
3 Click the **Key** or **Name** for the term.



4 Enter the description of the glossary term.



5 Click ***Update Term***.

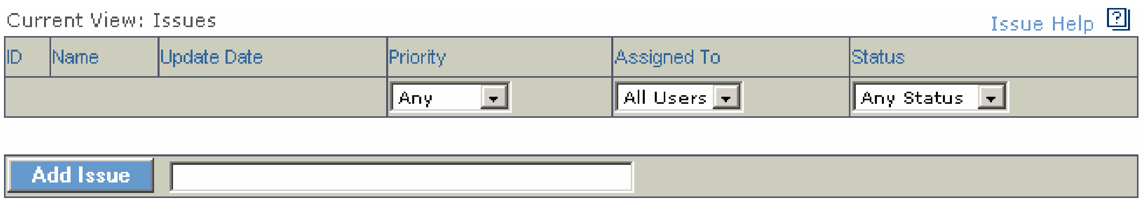


6 Enter additional glossary terms and descriptions as necessary.

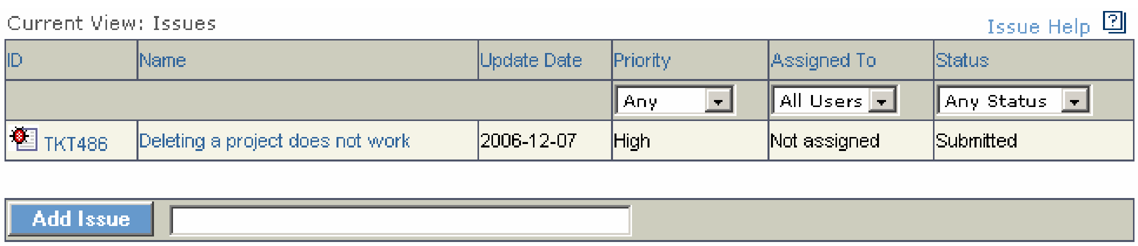
Add Issues

As you use your Gatherspace, you may encounter problems with some screens functioning properly, or have some suggestion for improving the way the application performs. The issues manager allows you to enter and display all such items.

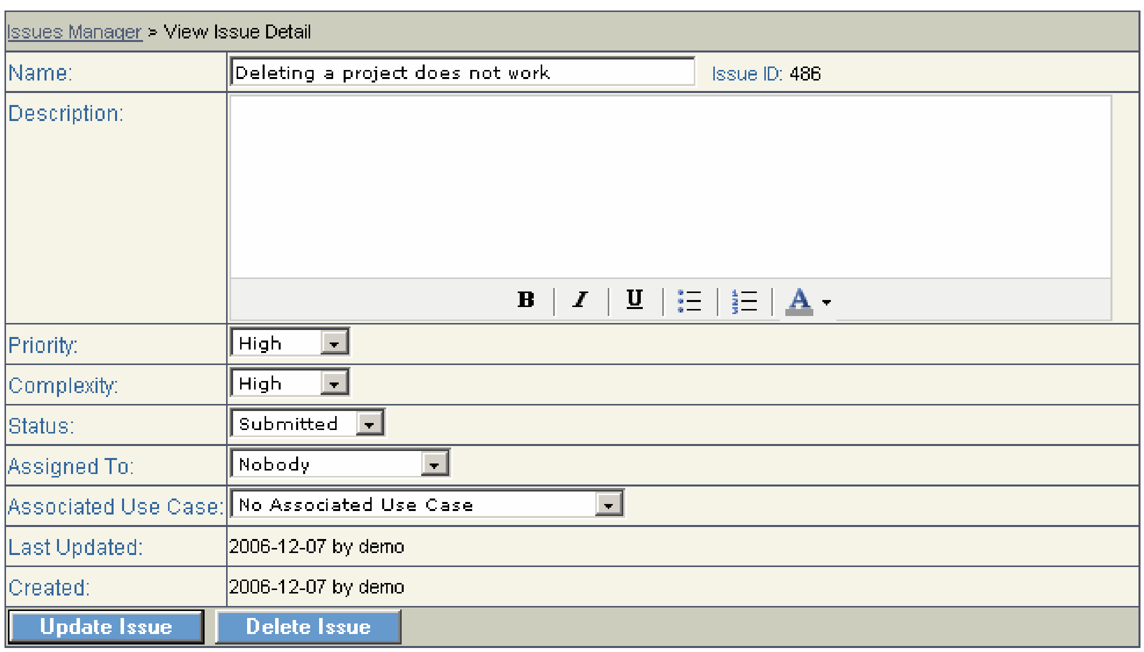
1 Click ***Issues*** on the Project Details list.



2 Enter the issue in the box and click ***Add Issue***.



3 To add details, click the **ID** or **Name** of the issue.



4 Enter a description of the issue in the box provided.

Make appropriate selections for Priority, Complexity and Status.

If there is an appropriate person to assign the issue to, make that selection.

If there is an associated use case, make that selection.

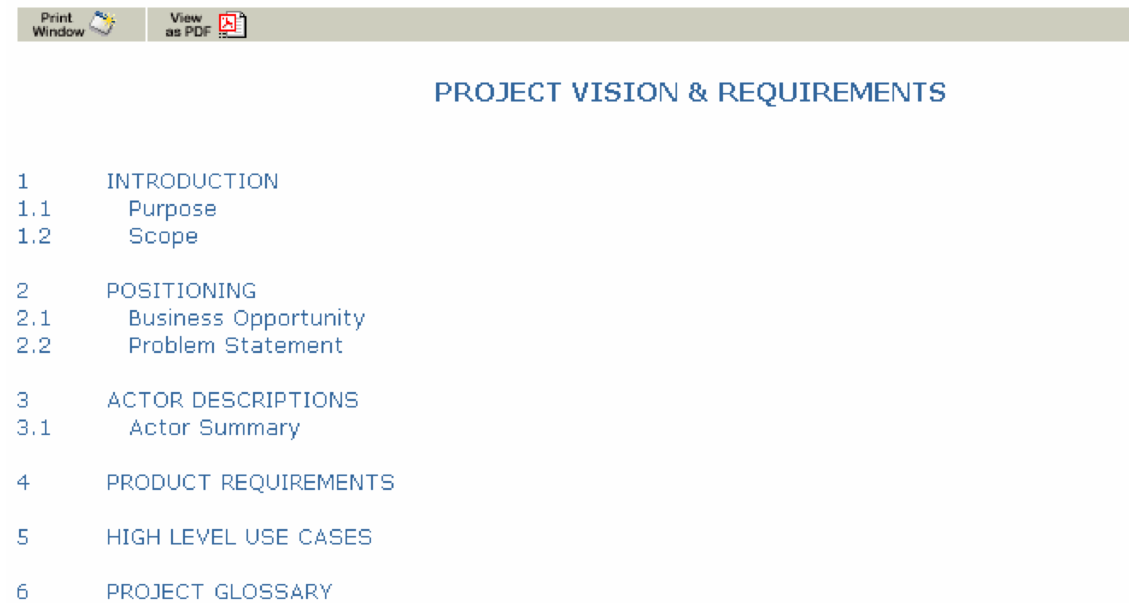
Click ***Update Issue*** when all selections are complete.

5 Enter additional issues in the same manner.

View Reports

The Reports section is found beneath your Project Specifications list and provides the means to look at the complete project from several viewpoints.

1 **Vision Document** – click to display the complete project in outline form, preceded by the main outline points (shown below). Project features are shown in the requirements section.



PROJECT VISION & REQUIREMENTS

1 INTRODUCTION
1.1 Purpose
1.2 Scope

2 POSITIONING
2.1 Business Opportunity
2.2 Problem Statement

3 ACTOR DESCRIPTIONS
3.1 Actor Summary

4 PRODUCT REQUIREMENTS

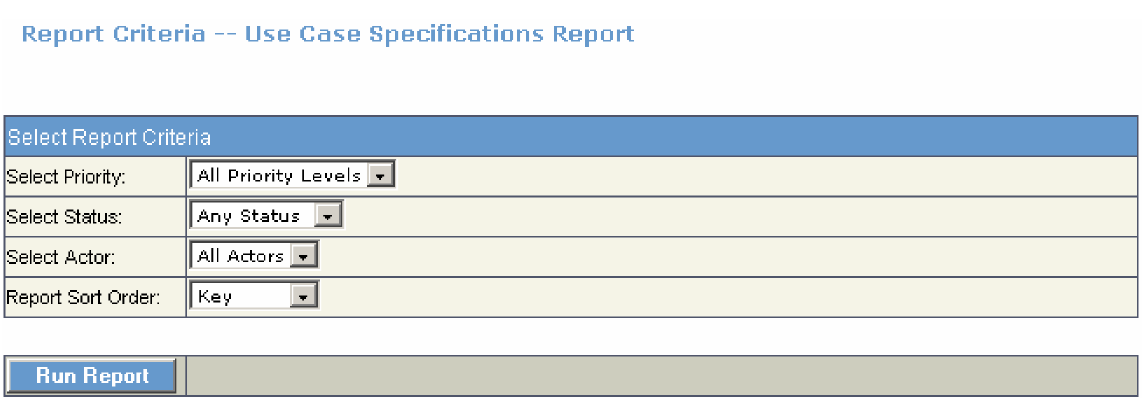
5 HIGH LEVEL USE CASES

6 PROJECT GLOSSARY

Click ***Print Window*** to open the document full-screen in a new window for printing purposes.

Click ***View as PDF*** to open the document as a PDF in a new window. You may save a copy or print the document.

2 **Use Case Specifications** – click to open a screen which allows selection of the criteria used the filter the report of use cases.



Select the desired criteria or just click ***Run Report*** to see all use cases.

UC4894 -- My first example use case	
Actor:	NOBODY
Desc:	My first example use case
Precondition:	
Basic Flow	
USER ACTION	SYSTEM RESPONSE

UC4895 -- My second example use case	
Actor:	NOBODY
Desc:	My second example use case
Precondition:	
Basic Flow	
USER ACTION	SYSTEM RESPONSE
1) basic flow 1 for second UC	

3 **Feature Report** – click to open a screen which allows selection of the criteria used the filter the report of features.

Report Criteria -- Feature Report

Select Report Criteria	
Select Priority:	All Priority Levels
Select Status:	Any Status
Select Assignee:	All Assignees
Report Sort Order:	Key

Run Report

Select the desired criteria or just click ***Run Report*** to see all features.

Feature Report
Project: My First Project

Priority: High/Med/Low	Status: All Statuses	Assignee: Everyone

ID	Key	Feature Name	Description	Priority	Assignee	Status
1	4468	My first feature	My first feature	High	Nobody	Submitted
2	4469	My second feature	My second feature	High	Nobody	Submitted
3	4470	My third feature	My third feature	High	Nobody	Submitted

4 **Requirements Report** – click to open a screen which allows selection of the criteria used the filter the report of requirements.

Report Criteria -- Requirements Report

Select Report Criteria	
Select Priority:	All Priority Levels
Select Status:	Any Status
Select Assignee:	All Assignees
Report Sort Order:	Key

Run Report

Select the desired criteria or just click ***Run Report*** to see all requirements.

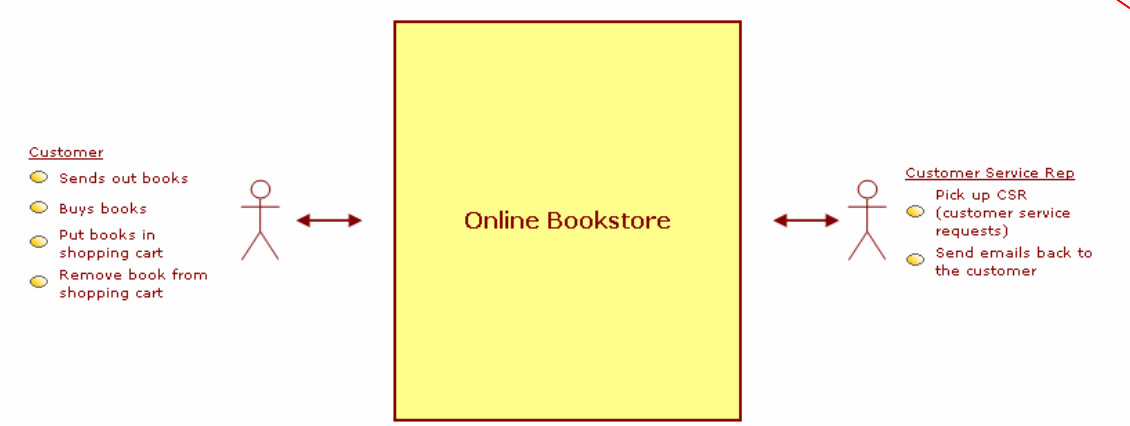
REQUIREMENTS REPORT
Project: My First Project

Priority: High/Med/Low	Status: All Statuses	Assignee: Everyone

Key	Req. Name	Priority	Compl.	Status	Assign. To
SR5847	My first requirement	High	High	Submitted	Not assigned

5 **Use Case Model** – click to display a graphical representation of established use cases.

Report Center > Use Case Report   New Window



Click ***New Window*** (red arrow) to view the use case model in a new browser window.

6 **Traceability Report** – click to display a report which shows the bi-directional linkage between features and uses cases and between features and requirements.

Report Center > Traceability Report New Window

Features to Use Cases: Forward Traceability		
Feature Key	Feature Name	Use Case ID's

Features to Use Cases: Backward Traceability		
Usecase Key	Usecase Name	Feature ID's
UC4937	System runs out of ink	No Linkage
UC4935	System provides receipt	No Linkage
UC4910	Get account balance	No Linkage
UC4936	Customer withdraws quickcash	No Linkage
UC4911	Card is rejected	No Linkage

Features to Software Requirements: Forward Traceability		
Feature Key	Feature Name	Software ID's

Features to Software Requirements: Backward Traceability		
Requirement Key	Requirement Name	Feature ID's

7 **Issues/Bug Tracking Report** – click to open a screen which allows selection of the criteria used the filter the report of issues and their status.

Report Criteria -- Issues/Bug Tracking Report

Select Report Criteria	
Select Priority:	All Priority Levels
Select Status:	Any Status
Select Assignee:	All Assignees
Report Sort Order:	Key

Run Report

Select the desired criteria or just click ***Run Report*** to see all issues.

ISSUES/BUG TRACKING REPORT
Project: My First Project

Priority: High/Med/Low	Status: All Statuses	Assignee: Everyone

Key	Issue Name	Priority	Compl.	Status	Assign. To
TKT491	Deleting a project does not work	High	High	Submitted	Not assigned