IQ MORE / IQ MORE Professional

Version 5

Manual

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Introduction

Welcome to the *APIS IQ-MORE Tools*, the software for *Customer Request Management*. The *APIS IQ-MORE Tools* will help you to enter and administer comprehensible accepted and void (customer-) requests, which is indispensable for product development.

The family of APIS IQ-MORE Tools covers the following products:

- APIS IQ-MORE
- APIS IQ-MORE Professional
- APIS IQ-RM-X

The content covered by this manual corresponds to the functionality of *APIS IQ-MORE Professional* at the stage of development that existed at the time this manual was compiled. In *APIS IQ-RM-X*, the MORE Tools are an integral component of *APIS IQ-RM*. This is a high performance tool for life cycle management, which is not covered by this manual.

The range of functions for the two stages of expansion to *APIS IQ-MORE* and *APIS IQ-MORE Professional* are represented in the following table:

Stage of expansion / *Function*	IQ-MORE	IQ-MORE Prof.
Customer Requests	✓	✓
Customer Requirement Management	✓	✓
Terminology Control	✓	✓
Multi-Language support		✓
Translation tables		✓
Tools to manage the translation conditions		✓
IQ-Explorer		✓
Export/Import		✓

APIS IQ-MORE Tools supports the user optimally when working within the field known as the *M*anagement *O*f *RE*quirements. The redundancy-free volume of data makes consistent and efficient changes possible in different IQ-documents without additional reconciliation. The software is adapted optimally for the Windows world and offers a future-safe basis for the integration into workflow systems and document management systems. Already today, all expectations have been fulfilled for the re-use of documented knowledge.

Hardware and OS Requirements

To use the *APIS IQ-MORE Tools*, certain hardware and software components are required:

- PC with a processor of the type "Pentium" or better
- Microsoft Windows 95, Windows 98, Windows ME, Windows NT 4.0, Windows 2000 or Windows XP (IA 32)
- 15 MB free hard disk space
- CD-ROM drive

128 MB RAM and a screen resolution of at least 1024 x 768 pixels are highly recommended.

Installation

The program files need to be installed on a hard disk drive because the *APIS IQ-MORE Tools* cannot be used directly from CD-ROM.
After inserting the CD into your CD-ROM drive, the installation runs automatically if the "auto-run" functionality is activated. If this is not the case, then you will have to start the file SETUP.EXE found on the installation CD by double clicking on it in Windows Explorer.

Attention: To successfully complete the installation process, the user needs administrative privileges on the machine where ***APIS IQ-MORE Tools*** will be installed.

What files are written to the hard disk?

The program directory contains the files of the ***APIS IQ-MORE Tools***. These are two subdirectories called `DATA` and `WORKGROUP` and are created during the installation process. Within the directory `DATA`, you can find an IQ-Document containing example data (`EXAMPLE.FME`). The directory `WORKGROUP` contains the following files:

File	Purpose
`APIS-IQ.CFG`	Configuration file: individual (user related) workstation settings
`APIS-IQ.INI`	INI file: company specific workstation settings
`NORMAL.FMT`	Template file: company specific document settings

What can you do with IQ-MORE?

With the ***APIS IQ-MORE Tools***, customer requests of all kinds (regarding a product, a system or a process) can be documented, systematised and administered.

For example, the requests can relate to customer requirements, requests of the legislator, technical requests etc.

For the ***documentation*** of the requests, there is the ability to describe them with detailed text of any length as well as providing them with notes. The text and notes can be translated into as many languages as desired. The notes can be divided into different categories (e.g. "Internal note", "Note for the customer").

For the ***systematisation*** of the requests, there is the possibility to set these in a meaningful way by relating them with one another. This results in a request structure, which sets the requests into a hierarchical order. On the one hand, the requests can be organised clearly with this hierarchy. On the other hand, ***APIS IQ-MORE Tools*** uses this hierarchy to consolidate information and make evaluations possible.

For the ***administration*** of the requests, there is the facility to provide them with a number of attributes:

- Acceptance status: undefined, accepted, rejected, postponed
- Priority: undefined, high, medium, low
- Expense measured in man-days
- Information about requestors
- Responsible person
- Deadline
- Further arbitrary user-defined attributes

These attributes can be used for filtering, searching, sorting and for various evaluations. The ***APIS IQ-MORE Tools*** offer a multiplicity of pre-defined evaluation possibilities (called "filters", e.g. "Requests that the user currently logged on is responsible for and have not yet been completed"). Besides these system filters, the user can define his/her own filters and can provide them with their own names and store them for later use.

First Steps

The APIS IQ-MORE Tools possesses a graphical user interface that corresponds to the latest default for the Windows program. If you have used other well-known Windows applications before, e.g. MS Word or MS Excel, then you should find it easy to work with the *APIS IQ-MORE Tools* especially if the most important concepts are known (see the chapter on "The most important concepts of IQ-MORE").

Furthermore, the following tools will support the user when familiarising themselves with the *APIS IQ-MORE Tools*:

Screen Show

A screen show is a self-running demo for a certain aspect of the *APIS IQ-MORE Tools*. The command "Screen show", found under the help menu, displays the different screen shows that are available.

The Assistant

The assistant supports the user when completing a risk analysis by analysing the current status of the IQ-Document and then offering advice on the areas that require further work. The assistant, like the screen show, can be accessed through the help menu. A detailed explanation of the assistant can be found by using the online help file.

Some helpful usage hints

If you select a menu item with the mouse, a short description of the selected command will appear in the status bar located at the bottom of the program window.

The context menu, which can be accessed with a click of the right mouse button, shows the most important operations that are available for the selected IQ-Object.

"Special Drag" (= "drag and drop" with the right mouse button) is a very flexible and powerful way of transferring and linking information.

The properties dialogue (e.g. accessed through the context menu) gives you the possibility to display and edit all the properties of the highlighted IQ-Object including the Assistant functionality.

Fundamental procedures

1. Run the ***APIS IQ-MORE Tool***.

2. On start up, a default IQ-Document with a default project and a default request are loaded automatically. This project has the name "Project: project" and you can see this on the screen within the editor for customer requests.

3. Highlight the default request to rename it or to add new requests to it. You can find the necessary commands under the "Edit" menu (To rename: choose "Properties" from the context menu or double click on the request. To extend the structure: choose "Add Requirements" from the context menu).

4. Store the requests in a file. You will find the required commands under the menu "File". The file will have the extension ".fme".

5. If you want to work with an existing file, open the file with the appropriate command found under the menu "File". If the file contains more than one project, then you will have to choose the desired project.

You can read more about the relationships between files, IQ-Documents, projects and requests in the chapter "The most important concepts of IQ-MORE".

What do the Editors of IQ-MORE do?

For efficient working, *APIS IQ-MORE* offers a set of tools called "editors". This chapter gives an overview of the available editors.

Editor for Customer Requests

With the editor for customer requests, the requests can be edited and added into a hierarchical structure.

To facilitate an overview of a number of requests, it is useful to group the requests into different categories and then group them further into sub-categories.

A customer request structure can be developed with this editor. In addition, all tasks can be completed in terms of managing the requests.

By using filters, parts of the request structure that meet certain conditions can be hidden or highlighted (e.g. "accepted requests with high priority").

Editor for Customer Requirement Management

This editor (also known as the requirements tracking editor) displays requests in a table with several columns that includes notes, status information and further information besides the descriptive text (the name). These columns can be used to sort the table.

APIS IQ-MORE displays only those requests that have had the attribute "Show in Requirements Tracking Editor" activated. Therefore, the structuring nodes that are not relevant for the requirements tracking editor can be suppressed.

Columns that comply with certain conditions (e.g. "accepted requests with high priority") can be hidden or highlighted by using filters.

By clicking on a column label, the table can be sorted by the contents of this column. It is also possible to group the contents by an individual column. Furthermore, you can use email to inform the people who are responsible for completing a certain customer request.

Therefore, this editor is particularly suitable for the management of customer requests and checklist work.

The Data Manager

With the data manager, you can accomplish the following administrative functions that are necessary for efficient working with the *APIS IQ-MORE Tools*:

- Set up persons and core teams. The *APIS IQ-MORE Tools* records, for each request, which user created it and who modified it last. Users can also be determined as responsible for the realisation of requests.

- Set up "Symbolic Responsible Persons" and "Symbolic Deadlines". If requests are to be realised, then it is necessary to assign a responsible person and a deadline to them. The *APIS IQ-MORE Tools* have taken this into account and have introduced a feature that enables "concrete" responsible persons and deadlines to be assigned with symbolic values that can be "concretised" later.

- Each request can be saved with the requestor that introduced it. These requestors must be defined in the data manager before they can be used.

- Terminology: This tool assists in editing and updating translations for the requests. The *APIS IQ-MORE Tools* allow you to maintain the requests in as many languages as desired.

- Notes List: The *APIS IQ-MORE* Tools allows each request to have notes assigned to it whereby these notes can be categorised and translated into several languages. This is the tool for the centralised administration of notes.

The Most Important Concepts of IQ-MORE

Personal Desktop

The personal desktop is the main user interface of the ***APIS IQ-MORE Tools***. The personal desktop can be divided up into two work spaces. In each work space, one of the two editors mentioned above (customer requests editor and customer requirement management editor also known as the requirements tracking editor) can be used. Each editor can work with the same contents, different contents of the same file or with different contents from different files. So, for example, you can open two request structures from different files to edit and exchange information between these files by dragging IQ-Objects with the mouse (drag & drop).

The contents of the two work spaces can be synchronised if the two work spaces include the same IQ-Object. If, for example, the upper work space contains a request structure and the lower work space contains the customer requirement management editor, then synchronising results in the highlighted IQ-Object of the request structure being selected within the customer requirement management editor as well.

IQ-Documents

An IQ-Document contains as many projects, requests and administration data as desired. You can find out more about projects later on in this document. Administration data are all those IQ-Objects that can be edited using the data manager as described before.

An IQ-Document can be saved as a file on the file system of your computer. It is important to save the file to your hard disk before the computer is switched off otherwise the contents will be lost. Saved IQ-Documents have the file extension `fme`.

New IQ-Documents can be created with the command "New" found under the "File" menu. A newly created IQ-Document always contains a project with a request structure, which consists of one root node (see below).

Projects

Within an IQ-Document (a file with the extension. `fme`), there can be as many projects as desired. For each project, a request structure can be developed. This structure can contain as many requests as desired. Projects and the request structures that are linked with them can be exported and imported between IQ-Documents. Therefore, for example, request structures can be exchanged between users by e-mail.

Projects can be created, renamed, deleted, exported and opened for editing in the customer request editor by using the dialogue for project management (command "Project Management" found under the menu "Administration").

Customer Request Structures

The *APIS IQ-MORE Tools* represent request structures as graphical trees. These trees grow on the screen from the left to the right. Like all trees, a request structure also has a root. The root node is the first thing you see if you open a project for editing or if you run the *APIS IQ-MORE Tools* for the first time.

To the right of the root node, you can see those requests that are contained in this structure. Subordinate requests are connected with their super ordinate request by branches (lines).

In general, you can say that this tree consists of nodes and branches (see example). There is always a root node ("Ballpoint pen"), leaf nodes (such as requests that do not have further requests dependant upon it, for example, "Appealing design" and "Quality of ink") and interior nodes (all the other requests like "Customer Requests" or "Technical Requests"). Interior nodes are usually for serving the structure, leaf nodes are usually for the actual requests themselves and should also appear in the requirements tracking editor (also known as the customer requirement management editor).
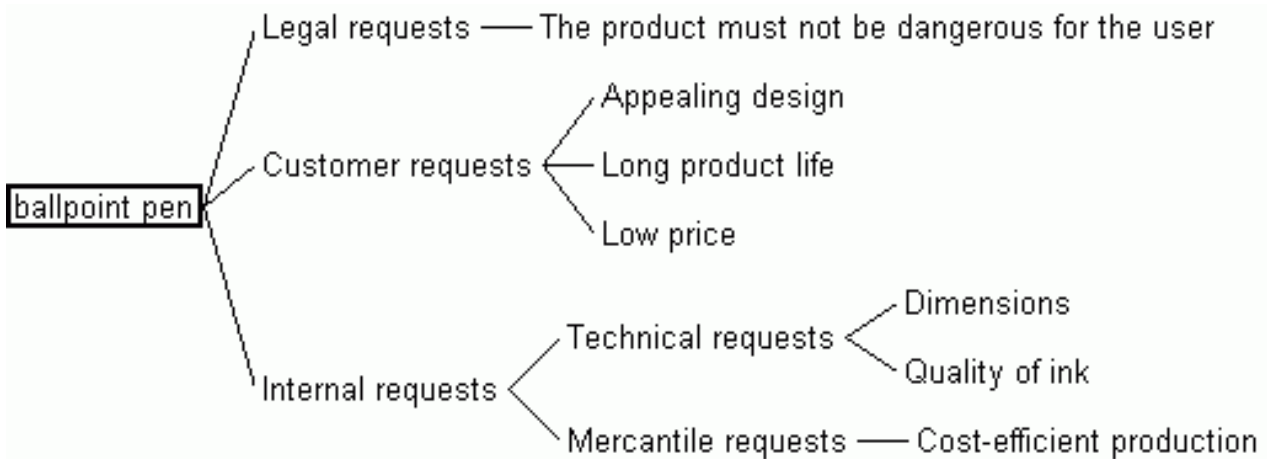
Designing a Customer Request Structure

You can find detailed instructions for designing and working with requests by using the online help. Here, only the most important steps are explained.

Extending the Structure

For each project, a customer request structure can be developed. It always begins with the root node. This is the first thing you see when you open a Project for development or if you run the **APIS IQ-MORE Tools** for the first time. Extending this root node develops the customer request structure. For this, the root node has to be selected (click on it with the left mouse button) and execute the command "Add Requirements" found under the menu "Edit". After this, the "Input: New Requirements" dialogue appears in which user-defined text (names of the Requests) can be entered. Each Request input is confirmed with the "Enter" key. To close the "Input: New Requirements" dialogue, press "Enter" when the input field is empty. After the input dialogue is closed, you can see the extended customer request structure.

This procedure is not only for the root node but can also be applied to each request. In other words, you can select any node of the customer request structure and extend it as described above.

Renaming and Changing Attributes

Simply double click with the left mouse button on the request whose name you wish to change. After this, the properties dialogue for the request appears where the name of the request can be changed as well as many other attributes.

Please note: Before you can assign a request to a requestor or a responsible person for the realisation of the request, you need to enter these IQ-Objects into the data manager.

Deleting

Use the command "Delete" found under the menu "Edit" to delete a highlighted request. If there are dependent requests to the deleted request then these dependent requests will also be deleted.

Please note: The root node of a request structure cannot be deleted.

Reorganising

You can change the position of one or more requests within the request structure by using "drag & drop" to paste it/them to the new place. Alternatively, you can use the commands found under the submenu "Reorder" (found under the menu "Edit").

Navigating in the Request Structure

The ***APIS IQ-MORE Tools*** offer several possibilities for navigating around large customer request structures. One option is to fold parts of the structure or another option is to focus on one element of the structure to help limit the amount of information displayed on the screen.

Folding

To obtain a better overview of extensive customer request structures, you can fold parts of it. The effect of the different commands for folding is demonstrated by the following abstract example:
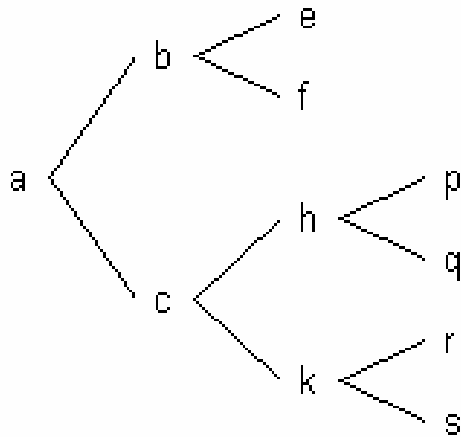
A folded part of a tree is indicated as follows:
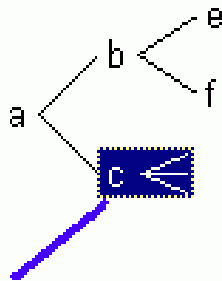
The commands described in the following are found under the submenu "Folding Operations" (found under the menu "View").

Show All

The complete customer request structure is unfolded.

Fold and Unfold Level

All nodes that are found within the same level of the tree as the highlighted node are folded. In the following example, the node *h* was highlighted before the command was executed.
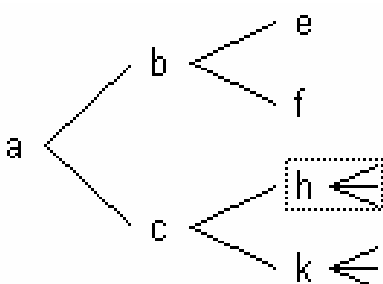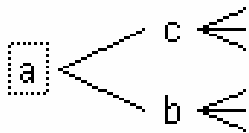
If the command is executed again, then it undoes the above command. In other words, the folded nodes are unfolded again.

Show Branch

A folded part of a tree is completely unfolded.

Show Next Level

The nodes of the next level are shown; the levels beneath are folded. In the following example, the root node was highlighted when the command was executed.
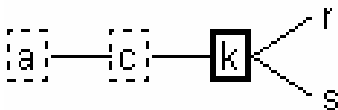

Hide Branch

The entire branch starting from the selection is hidden.

Make Focus Element

Focusing on a node is a further possibility for limiting the amount of information displayed. In the following illustration, the node "k" was focused on:

To focus on a request, highlight it and choose the command "Make Focus Element" found under the menu "View".

If a node of the request structure is focused on, then all requests that depend upon this focus element directly or indirectly are displayed on the screen. However, dependent requests to the nodes that lie to the left of the focus element are not displayed. A dashed frame enclosing these particular nodes indicates the hidden connections to other requests. A thick frame represents the focus element.

It is also possible to fold the nodes to the left of the focus element (command "Collapse Root Left" found under the submenu "Folding Operations"). This results in the focus element looking like the root element. If the command is executed again then everything is unfolded.

Please note: If you add new requests to a node that is to the left of the focus element, then these cannot be seen. To see them, you need to only focus on the root node or a node that is located to the left of the extended node.

Filtering and Highlighting

Filters are a further possibility for restricting the amount of information displayed. With the command "Filter" found under the menu "View", you can open a dialogue box where you can define a filter. In the dialogue box, you can determine the filtering criteria and can also choose the name of the filter. The filter will be stored under this name within the IQ-Document and can be recalled at any time. Filters can also be exchanged in-house via the use of templates.

If a filter is in use, then all requests are hidden that do not conform to the filtering criteria. However, the basic request structure remains constant in the customer request editor. That means, that all internal nodes, which are required to arrange the request in the structure referring to the filter will be correctly displayed.

As well as filters, there are highlights that can be used in the customer requirement management editor. In this case all requests that match the filtering criteria are highlighted with colour, however, no information is hidden from view.

User-defined Attributes

One or more attributes can be assigned to the requests, which can be defined and administered by the user. The assignment and administration of the user-defined attributes takes place in the properties dialogue (command "Properties" found under the menu "Edit"). These user-defined attributes can also be used as filtering criteria. Within the customer requirement management editor, you can also decide if the user-defined attributes of a request are to be displayed by using the display options.

Notes and Note Categories

For each request, one or more notes can be attached. There is a predefined category called "System". Further note categories can be set up at any time in the data manager. Using the command "Document Settings" found under the menu "Tools", the note category can be chosen according to the standard.

Document Settings and Workstation Settings

The menu "Tools" contains commands with which you can change various settings. The following points differentiate between document settings and workstation settings:

- **Document settings** are saved in the current IQ-Document and "move with it", for example, when it is copied to another place or dispatched by e-mail.

- *Workstation settings* refer to the workstation of the user and can be different from computer to computer.

Document Templates

The document template offers a possibility of establishing in-house standardisation for working with the *APIS IQ-MORE Tools*. By creating a new IQ-Document, the contents of the document template will be copied into the new IQ-Document. It is concerned with the following information:

- Document settings
- Header labels
- Header and footer contents
- Print jobs
- Filters
- Column labels
- Teams and persons
- Requestors

To create the document template for the first time or to edit it, open an IQ-Document that contains the desired settings (e.g. default for headers and footers, printing or teams and persons) and use the command "Update Template" found under the menu "Tools". With the command "Read Template", you can load the current contents of the document template and accept them into the current IQ-Document (e.g. if these have been changed).

Display Options

You control the appearance of the information on the screen with the display options. Use the command "Display Options" found under the menu "View".

In the Customer Requests Editor

The following display options are possible in this editor:

- Numbering
- Show summary information of the requirements
- Display status flags of the requirements
- Name length

These display options have the following meaning:

With the display option "**Numbering**", a unique number is inserted in front of each request. Decimal stage numbering is used and is calculated by the position of the request within the structure. Also, the user can enter the number directly. A directly entered number takes priority over the automatically generated numbers. Directly entered numbers will automatically generate numbers sequentially in the subordinate levels.

With the display option "**Show Summary Information of the Requirements**", the nodes of the request structure display the following information:

- A counter for the Editor (x, y, z). x is the size of the request structure in terms of the total number of nodes, y is the number of the requests that are shown in the requirements tracking editor and z is the number of the accepted requests.
- The sum of the assessment costs of all requests.
- The sum of the money spent by requestors.
- The proportion of the settled requests.
- The proportion of the requests with deadline transgression

With the display option "**Display Status Flags of the Requirements**", symbols of the requests are displayed that indicate their status. The following table gives an overview of the symbols and their meaning:

Symbol	Meaning
✔	Request is accepted
Cancelled text	Request is declined
▼	Request is postponed
↓	Request with low priority
▯	Request with normal priority
❗	Request with high priority
👥	Prospects are registered for the Request
📇	Prospective buyers are registered for the Request
🖼	Responsible person is determined for the Request
⚒	Request has an existent assessment of costs
📋	Request in process
Green background	Request processing completed
Red background	Request deadline transgression

With the display option "Name length" you can determine the length of the request in terms of the number of characters before a new line is produced.

In the Customer Requirement Management Editor

The display options of the customer requirement management editor are used to hide or view columns of the table and other additional information like for instance notes and user-defined attributes. Also, there is the facility to group the entries for one or more columns by using the grouping field so that, for example, all requests with high priority are grouped together. It is also possible to sort the contents of one or more columns.

Print

The ***APIS IQ-MORE Tools*** work according to the WYSIWYG principle, i.e. the printed image always resembles what you see on the screen. All applied display options, folding, focusing and filtering are included when printing.