

Jama Basics New User Training

<https://www.youtube.com/watch?v=pm40TgdNNu0>

Jama is not just a requirements management tool.	00:06
It's not just a test management tool, it's really designed to modernize requirement and test management.	00:09
What this does is it allows you to do something that you really can't do in the world of spreadsheets and documents and enterprise level.	00:18
Big storage tools, and that is that it provides a means of collaborating on product development in a way that you haven't really been able to do before.	00:28
And that means that basically, this becomes a strategic single source of truth and a very social kind of area to work in on the products that you're developing	00:38
So, just to give you kind of a background on what John is meant to do I find a lot of times in these classes that the people that I'm talking to our people that didn't	00:49
Have the opportunity to be a part of choosing Jama, if you weren't part of that great, you already understand this, but it will take up a couple minutes of your time.	00:59
So, what we find when people switch over to Jama is that most of the time before then they were working in the world of documents and spreadsheets.	01:08
And if not, they're working in some sort of an enterprise tool like doors that is managed by one or two people. And again, that information is available only kind of through them.	01:17
So, what ends up happening, one way or another, people call a big meeting together. And from that meeting they determine what they're going to be creating, somebody then has to go out and create the document.	01:28
That says these are all the requirements. This is how we're going to pray with these requirements are being met. And then they send out something that says hey review these things.	01:38
The difficulty then becomes in gathering all of that feedback. So, it's this right here where things start to fall apart a little bit. So, as you can see here, people just talk in different ways to collaborate. Wait.	01:47
One second. We got	02:01
Noise	02:03
fix that too. So, they communicate in a lot of different ways. And sometimes they just say sometimes they don't be an email that has the debt and review meeting things along those lines.	02:05
It's really difficult to keep up with what everybody is saying. And then when you have decisions that need to be made. It's hard to capture those decisions to	02:15
So, basically work gets to be a lot harder than it really needs to be	02:24
What we're trying to do. And Jama is simplifying this, make it possible for everyone who is on a product development team to know what you're building	02:29
And while you're building it, and we do it a bunch of different ways that are a little bit different than the way that you've done work before	02:37
	02:44

So, we provide a collaboration platform that ties all of that collaboration to the information that is important and allows people to participate in discussions that are then saved and captured 02:58

We also have visibility, all the way up and down the spectrum. So, I'll show you what that looks like. 03:03

We provide one place where you can store all the information for a project, not just the information of what you're working on, but also the decisions that were made the comments that people had the edits of things, so forth and someone 03:19

So, this is what Jama is designed to do for you. Any questions on that. 03:25

So, Jama lets you manage these complex projects by connecting everybody together in a single location so that all the information that you need is in one place. 03:35

What we're going to talk about today is I'm going to get in and first I'm going to show you some navigation basics. After that, I'm going to talk to you about how you work with information. 03:44

I'll explain the concept of traceability and how that's done in Jama will talk about reviews and collaboration stream, and then we'll briefly mentioned the other things that John we can do. So, there's a lot and Jama can do 03:56

We're just going through the real basics today. So, what we're doing is trying to get you ready to get in and have and get started in Jama. 04:05

So that you can build good products with the solution that's going to capture all that contacts keep track of all the changes store everything in one place and make things visible so that there's less that can slip through the, through the cracks. 04:21

Any questions on any of that. 04:26

So, in this next section I'm going to jump straight in. I'm going to shape what browser's Jama supports had along and so forth and so on. 04:34

As I said, I have a whole bunch of slides here that are going to walk you through everything that I'm about to talk about. I'm going to leave the slides now, but I want to know that we do support Firefox Google Chrome 04:46

Internet Explorer and Safari with Internet Explorer. We do recommend 10 or 11 so keep that in mind where, you know, the older versions are starting to get away from 04:58

So, all you have to do to access Jama is pull up one of these browsers. I'm going to pull up Chrome. And then you'll log in here. 05:07

And I've already done the login. But if you want to see what the logo looks like. This is our login screen to put your name and your password and obviously 05:17

Any go in and then the very first thing for you that are on hosted that you're going to see is this homepage. So those of you that are on the earlier version 2014 05:29

Are going to be dropped immediately and the last project that you've so anyone have this home screen. So, keep that in mind. But the newest version of our software does include this home screen. 05:42

So, the home screen is going to list areas that you've recently viewed is going to list reviews that you're a part of and I'll explain what reviews are here in a little bit. 05:51

And also list stream conversations in which you've been asked specifically to participate in a specific way again I'll explain what all of those are here in just a little bit, but any place that you see a blue 06:09

Thing, and you can see when we go there, that we're actually going over a particular
06:15
piece and you get a little hands. That means that you can go straight over into that. So, they're always going to
be links.
As you can see,
06:24
From here we have access to all the other different areas of the tool that we have access to
06:30
So, most of you are probably going to see these three streams projects and reviews, you would only see stream
and reviews. If your only job is to be a reviewer, the most, you will see that very few of you. I'm guessing will
be seeing the admin area.
06:46
Over here on the right, you'll see your name and this is an important area because if you click on this, you can
change all of your user settings here.
06:55
So, you if your email is wrong or if you want to put a picture in or things along those lines. And then there's
some other things that will be talking about as we go through. I'll explain what these other tabs do
07:08
There's some built in reports up here, built in health, so forth and so on.
07:13
So, let's look at the main area. And that's going to be the projects area.
07:18
And the projects area when you first get in, you'll see the dashboard and this dashboard is going to be built by
your project manager.
07:25
So, they will be able to add, remove, widgets. So, if there's like some summary information that you want to
see that you don't see here, reach out to whoever owns this project and they can add to it if you don't want to
look at something, you can always minimize it.
07:42
But when you log out log back in, it'll come back to the default state. These are always interactive. So, if I
actually wanted to see all of the business requirements that are ready for review. I could click right here and
and get a list of those items.
07:56
The way that you interact with Jama is basically through just clicking on things over here on the left we have
what we call the exploratory
08:04
But you can see that we have other tabs to go to different ways to be able to see information. So, we have
filters that will allow you to kind of, you can build a filter.
08:13
And you can get lists of those very quickly. We'll look at that here in just a bit. We've got releases. If you're
using those we've got baselines. If you're using those. We also have testing that we're really not.
08:25
Talking about today, but I do want you to be aware of it.
08:30
Any place where you see this configure icon. So that little here, it means that you can change the configuration
on something to see this in a few other areas, as we go along.
08:43
So here for example I could change the settings to show other things that I might want to show here in the tree
to interact in the tree. I can just open things up by hitting that plus sign.
08:55
And you'll see that we've got like a hierarchy here that's been built to include all of the information for your
particular project, these very often will follow the kind of
09:06
Headings and sub headings that you might have seen in a document like a business requirements document or
something along those lines and
09:14

There's a difference in the way that the information is stored in the handle and I'll explain that here in just a little bit.

09:19

But if you ever want to look at any of these sections, you certainly can. If you want to look at one little piece, you can just click on this.

09:26

So right now I'm looking at a single business requirements. It's got a name and a description. And then over here on the right is some stuff that provides context for me for some of you this context is actually going to be included.

09:41

Of this not what I wanted to do on the bottom. So, there will be tabs that are right here in this area that you click on instead of tabs on the right. So, keep that in mind that the same things. They're just located in a different place.

09:59

So, we can we can do this alone. Most of us that look at this particular item and we can also, if we want pull a list of things. So, let's say I wanted to see all business requirements, I could just click here at the top. And now I'm looking at these items.

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So, if you look at this list right now I'm in what's called the reading view and this reading view allows me to quickly kind of scan through this information.

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And look at it like I was looking at a Word document.

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And this will list by default. It'll have the name and the description you may actually have more information showing here based on how your administrator has set this up to be shown

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This is one way that you can look at the list of information. Another way that you can look at the list of information is to look at it in the list view. So, if I go to list view here.

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And again, for those of you who are on an older version of the 2014 or older. And instead of having these toggles you'll have something up here that says view. And if you click on that. It's going to be able to switch between reading and list view.

11:05

So, this is the list view and list view looks a little bit more like an Excel spreadsheet and I can drag and change the size of things. If I want to I can move things around. So, if I wanted to maybe have the priority over here. And then also, I can add or subtract columns.

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So maybe I wanted to see what date it was created on I can add that very quickly. Maybe drag it up to the front.

11:34

And you can see that I have that and that only changes for you by the way so that doesn't change it for everybody. You don't have to worry about that. But it does persist. So as long as you're logged in. This is what you're going to see

11:50

whales have a way to go through multiple pages here, down at the bottom.

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And this is important. By the way, the like looking at things in the list view and so forth is important because you can always export any list that you're looking at, or any single item that you're looking at.

12:05

You can export to word or you can export to Excel, if I export to Excel from here, what you see is what you get. I will get exactly these columns and exactly the way that they're structured right here.

12:17

If I export to word. It's going to look a little different than name and description will be there and then there'll be a table of all the other fields that you see it here included

12:28

You'll have an Actions menu that will allow you to do a few things in this case, like if I selected an item.

I could go here and edit it. Maybe I could delete it. You may not have that ability. You may not have an Actions menu. If you don't, that just means that you do not have the ability to make changes to any of these items that are in this area. 12:35

So, these are the basics of how you get around in Jama. Any questions on any of that. 12:50

Okay. So, we talked a little bit about how to get around that sort of thing, how to move. I want to show you also how to search and find information here and Jama really quickly. 12:58

So, let's say I'm going to actually pull. I'm going to go back over here to the desk to the actual dashboard and I'm going to change that, that I have a list view. 13:07

Of everything that's in this. So that's a lot of stuff that's in a single project. Maybe I only want to find a couple of things. So maybe I just want to find stuff that has to do with billing, I can go up here to the project where you can type in billing 13:18

And that's going to give me a list of items that have bill or billing somewhere in the name and description. 13:33

Right, I can also search for other things. But that's the main area that people tend to search for when they're doing a search. I can also decide to look through all of my projects that I have access to. You just by clicking that to all and then doing the search again. 13:40

And then that's going to pull from a bunch of different projects, whatever project he happened to be in. And that works really good if you're just trying to find something quickly, but a lot of times when you're actually doing something like this. 14:00

There are some very specific things that you don't want to find over and over again. 14:14

So, if you want to do that, let me just delete. Let me go back over to 14:19

This list. 14:25

There we go. So, let's say that on a regular basis. I need to look at anything that's changed in the past week or something along those lines. We have what are called quick filters and these quick filters are available and everything that's 14:28

Are ahead. So, keep that in mind for those you that are on 14:45

These filters are not available just yet. When you upgrade to the next 2015 version. Those will be available. 14:50

So now I can say, You know what, I only want to see things that were changed in the last 30 days I select that. 14:57

And now I have a list of the things that are that were changed in the last 30 days I can then change whatever I'm looking at here, I can change this over the reading view, if I want to. So all of that stuff still applies. 15:04

I can also, if I want to 15:18

Filter down by the type of items. So maybe I only want to look at the use cases. And now I can see all the use cases that are actually part of this project. 15:21

And even if you don't have the quick filters and I can see that there's some things coming in on chat. I'll make sure to get to those here in just a second. 15:31

You can also do advanced searches or you can go over here and build a filter. 15:39

15:44

So, when it filters it's just basically a database query. It's going to go in. It's going to look for very specifically, the kinds of things that you need to find
15:56

So, I've got some here that I favorite it. So, there's a requirement here missing test cases. If I want to see that list. All I have to do is click on that and then automatically pulls that up.
16:07

And if I want to create a filter. I can go to Add filter and then just start building it.
16:14

So I could go out here and I'd say, you know, maybe across all the projects that I have access to, and anytime I want to be able to see all of the business requirements.
16:27

That
16:31

Don't have
16:39

Don't have any downstream requirements and I can actually add. Oops. There's nobody wanted to do.
16:49

Add another rule here, may I want to look at functional requirements, the same way.
17:00

And as I'm doing that. You can see it. We get results here and I can preview those results. I can view them in a list, maybe I don't want to do that or I can save this and if I save it, it pops up over here. And now I can come back and revisit it if I want to
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So that's how you get around and how you find information in Jama.
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So, show you what what Jama looks like. But you might have noticed that we don't
17:28

Work in the world of documents or spreadsheets, you can get lists of things in that, but really what we work on as in the world of items. And there's a reason for that. So, I'm going to tell you a little bit about this, it's a different way of looking at the information that you have
17:46

In requirements management that a lot of people have done in the past tends to be very document based. So, you've got this big long document that everybody looks at
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And even if it's not stored as a document, even if you got it in some piece of enterprise software. A lot of times it's pulled out as a document.
18:00

The problem with working with documents is that the collaboration that we do on that is not captured. So, if we're just talking about it or we have meeting notes we have emails.
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You know, all of that stuff gets scattered about if you've ever had to go and search through three months of emails to try to find that one where somebody approved something that you're going to be doing.
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You know the pain of not capturing that collaboration right there. The other thing is we lose the context. Once we get that final, final document we don't know who asked for changes or why they got asked
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You know, that kind of thing. So, what happens is that all that context. All of that feedback. All that collaboration.
18:39

Means that in all these other different places means that we lose time trying to chase down the context. Why is this the way it is, or looking for what matters. Was this improves sense for us to work on.
18:52

So, what we're trying to do in modern requirements management.
18:57

Is move away from the concept of a document them into the concept of an item. So, an item is going to be one piece of information.

19:05
That one piece of information, whether it is a single requirement, whether it's a single test case whether it's a single I don't know figure or anything along those lines that you want to use in there.

19:17
Is going to have a rental debts collaboration and context. So, if you have a question about that. You're going to want to get into Jama go to that item and ask a question right there.

19:27
We have ways of making sure that people are notified of that so that they know to come answer that question.

19:32
And then that context becomes part of the item and is built over time. So even as your team shift around or as new people come in, they're always able to capture that context and kind of get up to speed, a lot quicker.

19:47
We also have a very structured feedback process that I'm going to go through that will really help you

19:53
Be able to go through and review items with a large group of people in a much more efficient way.

20:00
So, what this is going to get us is we're going to be able to find what matters quickly and we're going to have context on hand, provided that our team works on everything within Jama.

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So that's something that we definitely want you to get into the habit of it takes some time.

20:14
To get into that habit I still from time to time will open up an email and start to send an email to people when really what I should be doing is capturing whatever question or whatever context that I'm providing in Jama.

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So, this is the concept of moving away from documents to items makes sense to everyone.

20:39
Okay. So, the concept of an item and item is a single discrete piece of information.

20:47
So, if we go over and we look at, that's not what I wanted. There we go. If we look at a single thing.

20:55
This is a single item and this item is going to have a name and description and these the system sets. And then it's going to have any other information that your

21:09
Group has decided that they need to capture along with this particular piece of information. This one happens to be a functional requirements. So, they wanted over what is assigned to you.

21:18
What release. It's a part of what is what's priority and status are. And it also to make sure that they're working on the things that are most important. We've got an estimate.

21:28
There and then they're also attach attachments and links which if you don't see them in line are going to be part of the context of the tabs down here below.

21:38
So, all of that allows us to capture information as far as the context of things.

21:45
We've got lots of context we're going to have relationships and those are going to show us the things that are related to this upstream and downstream. We'll talk about that more later.

21:54
We're going to be able to see the people that are connected to this item in some way and in comments that people made

22:00
Anything that's been done to that particular item, all of the versions of the item and then if you're actually reusing the site in from another place, you can actually see those synchronization is there.

22:17
So that's an item, when we go up from an item we're going to be in what's called a set. So, this manage patient profile is a single item, and it is part of this many business requirements set a set

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Is nothing more than a logical grouping of similar items right so all the business requirements might be in one set, whereas all the functional requirements might be in another set
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So again, that hierarchy has structured is going to be something that either with a consultant or with each other, your teams have determine how they want that to be set up in the system.
22:58

But those sets exist.
23:01

Sometimes in sets there also be folders and you can actually use folders anywhere within that kind of hierarchical setup so organize your information.
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Above that is what's called the component which is just a grouping of sets and their information. So, if we go back over here.
23:19

And we look, these two things that have the squares a component will always look like this, it'll always have those those little foursquare's there.
23:28

And you can see here that in this sample project that we have. We've got somebody we got a mobile set and we've got a desktop set
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And the reason that we do is that the mobile team and the desktop to work maybe almost completely independently and they really only want to see the information that's important to them.
23:47

We see a lot of this an integrated systems companies. So, people will have say a hardware component a software components and then have items that are related between
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And then finally, of the very top, we call that a project within Jama, we realized it might be a product that you're building or something along those lines, but we had to name it something so we call it a project.
24:09

This section is about traceability, so I'm going to show you what traceability is I'll show you how that traceability works.
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Then we'll talk about all the things that traceability get you
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To one is traceability is nothing more than linking items together that are related. Right. Basically, we're doing that so we can make sure that we know if a change in one thing is going to affect something else.
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We call those links between items relationships in Jama and those items can be upstream or downstream. The easiest way to think about that.
24:44

Is an upstream item is going to be an item that impacts the next thing down if it changes. So, if we're looking at kind of a traditional waterfall environment. If you have a requirement there and then maybe have a use case underneath that, and that requirement changes.
25:01

That use case may no longer be valid. So, we want to know that. So, we're going to build a relationship between two those two things but the requirement will be the upstream
25:11

And the use case will be the downstream. And that way if that requirement changes. I know automatically to check that use case.
25:20

And somebody asked earlier that the universe. There's only one place where you can actually build those are actually multiple places in which you can build relationships. I'm going to show you one today. And then I'm going to talk about the others. Okay.
25:35

So, okay, I already talked about that. One of the things that I wanted to talk about his relationship rules. So, within a project that you have, you might have a set of rules on what relationships can be created.

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These rules are defined by the administrator and then applied to a project and then they say, what to expect. As far as relationships in the project right so

26:01
For example, there's a business requirement here.

26:06
From business requirements. I might derive a non functional requirement. That's what this dotted line means it is possible to create that kind of relationship.

26:16
However, a business requirement does not need a non functional requirements downstream from it. That's why the dotted line exists the solid line.

26:28
Tells me that this business requirement must have a use case downstream to really be considered complete

26:35
And that this use case needs to have a functional requirements and then the functional requirement needs to have a test case. So, if at any point those downstream items don't exist, then that item is considered basically out of compliance and there'll be a flag on it.

26:53
If I look at an item. So, I'm looking at this item right here and I want to see what items are related to this. I do that by looking at the relationships. Again, for most of you that are on hosted you'll just click on this relationships and it'll open up down here.

27:09
If you don't have the stuff on the right, then what you'll have or tabs above this and one of those tabs will say relationships. So, in this case, I have one upstream item from this use case.

27:21
So, I have one upstream item from this use case. Right, so I could have something downstream from this, if I'm following the Father, we were just looking at.

27:29
I would expect to have a test case downstream from this and if I don't have that test case downstream. I can actually build it.

27:36
Right. So, there's a couple of ways that that can happen. Somebody can actually go out and add a related item so I could go out and build whatever is required from down here.

27:49
Or I could go out and related item that already exists.

27:56
And the things that I can actually relate

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Will be clearly marked. So those are the things that you can see right here. So I click relate

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And it automatically builds that relationship for me.

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Now one of the things I mentioned earlier for the potential of reporting purposes are these relationship types. These are set up by an administrator and they're very, very easy to add. So if you needed another type for reporting purposes to be able to filter on it'd be very easy to create

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For that. So right now the default is to risk related to, but that can be edited, so I could change that to dependent on or derived from those are the only other relationship types. I have like the one I mentioned to you earlier, you can have

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You know something along the lines of impacts.

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The validity of or whatever makes sense is literally just typing text that makes sense to you. And then it becomes part of that that that list that you can pick from.

29:01
So that's the one on one way of being able to create items.

29:09
Yeah. So, the question I got a question. If you have if you relate an item is it only one level up or down. Yeah. When you first create that item. It's just going to be immediately downstream immediately upstream. So it's one level. And then if you want to create other levels, you can do that.

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The hand down. Right. So, there's actually some pretty easy ways to do that. So let's say I've got this downstream item right here. Right. It's a functional requirement. I know that there's a test case related to that, I can click on that.

29:42
Go to the relationships and I can see that the test cases already there. Or if I needed to. I can relate the next item.

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So, this, again, is the one on one way of doing this. So that is can take a little bit of time to do. And I understand that I recognize that there are a couple of other ways that you can do it.

30:03
One of the things that you can do is go to the project level and I do not have a slide on this. So I'm going to show it. We are recording this, but you might want to like quickly kind of take some quick notes if you get a project, there's this traceability and you can go to a trace matrix.

30:19
So now let's say that I'm going to get those functional requirements.

30:24
And those test cases.

30:27
Oh, just close it. That was not smart.

30:32
Try it one more time functional requirements.

30:36
Test cases and click the matrix. So, now, right, I've got all of the difference functional requirements here that all the test cases up here. I can quickly create relationships by clicking say I want this to be upstream or downstream or no relationship.

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So, I can create a whole bunch of them just by doing a bunch of double clicks on this.

31:00
So that's one way quick to create relationships really quickly. The other way is we do have a relationships important plugin.

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It's a little complex but support would be happy to help you with it if that is something that you have

31:16
And we understand that, like some sometimes there's just a huge amount of relationships already built between the items and you just want to get them into the system. So, it is possible to do that via an input plugin.

31:32
So, we had questions earlier about some things that I'm going to show you right now. The very first thing that I want to show you is that we have a relationship status here.

31:42
And that relationship status as long as you're on 20 14.2 or above this relationship status will exist if you're on a version newer than that are older than that.

31:56
It won't show. So, keep that in mind.

32:00
If you don't see it, it's because you're on 20 14.1 or earlier. And that's a version that we don't even support anymore. So definitely moved up if you can

32:09
Those relationships that what that is telling me right now is that there are some problems with this relationship with this particular item. What are those problems. Well, if I mouse over this.

32:25
Let me look at a tree.

To do. 32:27

If I go to the tree. I can see these here as well. Right, so I can look at this item and what it's telling me as that this is an orphan item. 32:29

So, in order to remind them means that there's something missing upstream from it. This is a business requirement. So, it's missing something. There's expecting upstream. It's also says that it's causing suspect and what that means. 32:38

Is that somebody has made an edit. 32:52

To this item that is impacting the items underneath it. So, if you can see basically somebody has edited this and now these use cases might be impacted. 32:54

So, I know that because I see the status and I can see that these are suspect. So, I can now go to those items, check them. And then if they're okay I'm go ahead and clear that suspect 33:05

And you can see that this clears up automatically if you're not on the hosted version. If you're on 2015.1 that does not automatically update like that you actually have to hit refresh. And so, there's a refresh button here. And if you hit that refresh button, it will show 33:18

It just doesn't do it automatically. That's the only thing 33:36

To always see some things that necessarily compliance with things and that's great. 33:41

Is that one, that one open, where am I going to close a couple of these things that are open because I'm starting to get kind of busy here. Um, let's say, let me go back to a functional requirement here. 33:49

So, I have an item here. 34:10

Right where I've got some suspect items with clear those 34:13

This is what a clean relationship status indicator looks like it tells you you got no problems upstream or downstream right now. 34:18

Okay. All this as well. I did. But what if you want to see the impact of a change because this functional requirement. Right. 34:29

I don't actually have the image that's there and maybe it got corrupted or something along those lines. If I add that image back in. Is it going to change any work that people have already done, or is it going to impact something upstream so that it can be completed. 34:35

To way that I do that is to go to View impact analysis. And again, there's a slide that will remind you of how to get here. 34:49

So, this impact analysis is going to show us upstream and downstream all of the things that are related to this particular item. So, to say show me everything I can choose a depth, if I want to, but I'm going to show everything. And what this does is it highlights the item that you're on. 35:00

And then it shows you everything that's upstream and downstream. So, we've got two degrees of separation. 35:16

You know, get direct relationships. And if you have to read raise four degrees, those would also show too. 35:22

So, I can see if I make a change to this particular item and searching for appointments 35:27

35:32

That I need to go back up here and check this particular business requirements and make sure that I'm still going to fulfill. I could click it and it'll open up in the background. And then I can quickly review it. 35:46

So that's impact analysis. And that was a question from earlier. So, I want to make sure that that made sense. Does that answer the question that was asked earlier on being able to see impact. 35:58

One of the things I want to show you with traceability is the ability to look at coverage, all the way downstream. So, if I go to project here and traceability. The other thing that's underneath here is what's called a coverage explorer. 36:11

And its coverage explorer. I'm just going to click it right here and show you what it does. So, you can build these and they're fairly easy to build. Here just do a search in the help for covered explorer. If you want to learn how to build these 36:23

But basically, what I'm looking at here is I am looking at the entire kind of workflow here all the way from business requirements down through test cases and defects. 36:35

So, I can see it for this particular business requirements. I definitely have what I need to be able to test this out and I do actually have a couple of defects that I need to think about 36:47

Before I can go any further I can also highlight something down here, and it'll highlight all the way upstream for me. 36:55

And these are exportable so you can't see everything here. But if you actually wanted to see some other fields and go to the settings and those fields, very quickly, apply and even though they don't show here. If I export those they will show in the export. 37:14

So, there's a limited number of these that you can actually see in the screen. And if you need to see the whole thing. The best thing to do is to export it. 37:28

So that covers traceability and looking and saying, Okay, great. 37:33

So obviously traceability is going to depend on somebody, setting up those relationships between items. The rules are going to define what items, what they can be created and what must be created. 37:44

And then we also have a number of views that show you how to have what those relationships do for you. 37:51

Any questions on traceability. 37:59

So, I'm going to show you what reviews do. So, I'll show you how you access to review interact with them. 38:05

View this the feedback and finalize those reviews. So, let's show you what a review us reviews are really like the kind of formal functioning of getting people's 38:17

Sign up on things. So, if you have the ability to edit an item, you also have the ability to send it out for review. So maybe I'm the person working on these scheduling functional requirements that they're in good shape. I'm going to go ahead and hit Send for review here. 38:32

And this is going to take me over into the reviews and automatically drop me into this, I gave it a deadline at a time. 38:41

And I hit next. And I started picking the people that I want to have involved with this someone because Becky, Ben. 38:49

And Peter here. So, all of these people are automatically what we call reviewers a reviewer is somebody that we're basically saying, hey, we want your input on this, but we don't need your approval.

39:01
Right. So, if you need their approval if you really want them to like sign off on this and just hit this check mark and that makes that person and upriver.

39:13
She can make multiple people with rivers, if you want to. And then if you'd like to capture those you can say require electronic signature from appraisers

39:23
And there are a few other options here for the moderators, but what I really want to show you is what a review looks like.

39:30
So, I'm going to log out log back in

39:35
As Mr. Johnson here.

39:39
Is one of my improvers

39:43
And you can see that he has automatically this homepage. Hey, you're an improver on this review, you need to go out and get that work done because I haven't done any of it yet.

39:54
So here, here's how these things work.

39:59
When I get in. I've got over here a list of a bunch of different items. Right. And I've got a table of contents that shows me that everything that's in there so I can go to things one at a time. If I want to

40:09
Or I'm going to scroll through these right and then what I can do is I can start making comments on this. I cannot edit an item in here.

40:18
All of the moderator can do that, but I can put comments on it. So, let's say I look at this full featured scheduling system. And I'm like, That's way too big. I didn't highlight that.

40:31
Never seen a do this before. What's going on here.

40:40
Usually I can highlight this and just type away. I've never seen is loading thing before. Know exactly sure why it's doing that, but you should get a bubble that looks like this, and you'd say, you can ask a question, what is full featured imply

40:58
I, I can have some Marcus, so I can mark it as a question. Hit submit feedback. And now I have actually asked my question there.

41:09
Since I'm an approver then I need to make a couple of decisions join what approved this thing say, Yeah, it's good. I'm good with it. This does not impact the status on the item. It doesn't impact anything it's just you putting a checkmark there.

41:22
Or I can say, hey, this one needs more work. Right. So, I go through

41:27
And Mark all of these and highlight where I need to highlight

41:32
When I mark everything, it'll say you've marked all the items in the review. And you can see that these filters are changing. I've got an item that needs more work than what I did with my comments and I wanted to go to those specifically I could just by clicking on these

41:49
I also have some different views and go to the feedback tab here.

41:54
Right and see all of the feedback here I can actually filter down based on the type of feedback. So I can go quickly just to questions.

42:03

If I wanted to, and there's also a stats tab that shows the progress that people are going through. So every time and approve or it's a checkmark or next the progress updates here. 42:14

So, I'm at 100% I haven't finished the review, but I've done the work right. Whereas these people have not necessarily done the work just yet. 42:23

So, at any point what I've done. I can choose to finish this review. 42:29

And when I do, I can make some final comments and notice that I cannot approve and sign this because I have an item that's marked as needing more work. 42:37

And 42:43

So, I do this I requested new revision. I've done my work. 42:48

So, now's the moderators job. I'll go back out as the moderator. 42:56

To keep up with this and answer any questions deal with any issues and make any changes that need to be made. Right. So, I've got this item that needs more work. I go to it. 43:08

And maybe I want to look at it. So, I looked at this and here's the questions that somebody asked, and I'm like okay so that's actually a problem, right. So, I'm going to answer that. 43:21

Wait a minute. 43:29

I'm going to answer that. Maybe we'll work on it for a couple of days and they'll come out and say make a change. 43:41

I'll just do that. 43:43

Right. So now I've made a change to that Haida 43:48

Made a change to this item. What happens is I get a thing that says, hey, and it was updated since version one is published. One of the really cool things about the review center is that 43:59

It versions. All of these reviews. So right now, if I've got 20 people out in that review, they're not seeing the change that I've made to the side of news, yet they will see it until I published a new revision. When I do 44:15

They're going to get an email that lets them know, hey, there's a new version of this out and then they can go out 44:22

To their review. 44:25

And notice that the x on this has been removed. 44:30

And then I've got this little compare icon. So now I can compare what's changed, and I'm going to see exactly what's changed. I just show details. 44:40

And everything that was taken out is going to be marched through everything that's in is going to be highlighted in green, that's all good by me. So, I'm going to hit yeah you marked all the items finish the review and now I can approve and sign this now I need a password.

Unknown Speaker 44:59

Right.

Host 45:01

Question. Yes. 45:04

So is there a way to show the changes within the same revision, by any chance, because sometimes we have feedback from different reviewers at different time. And can we show red light, maybe to the 45:19

Changes so that way. 45:23

I see what you're saying. My recommendation would be because all of these items are going to carry the context, right. So, you're gonna be able to see the comments that people made 45:34

I wouldn't wait until you have several comments on this make the changes that you need to make and push out a new revision. Once you've made several changes. 45:43

So, there's no way to make those changes within the same revision. 45:49

But other people can see the comments that other people are making so they know if something has been brought up already. And they will always have the ability to agree with that person. So right here, what's full feature implied. If I log in as same Becky. 46:08

My concern is when you publish a new revision, will you lose the original comments. No, no. The comments. Yeah. The comments. Keep going. Right, so 46:20

Yeah, you'll move any other company now it's really common for me to like have say 46:27

12 or 13 people working on something and whoever is the first person to come out like my find a problem and then everybody else just agrees with it. And if I see something that three or four people are agreeing with and I know that that's something that I really need to change. 46:42

I know these don't go away. And as a matter of fact. 46:47

Objects. 46:49

To go back over to the projects. 46:53

And 46:58

Functional Requirements scheduling. 47:12

There you go. So, this. If I look here at the activity. 47:20

Is disabled. If I look at activity for a particular item. 47:24

Right, you can see that this was part of this review and if there were any comments on it. I could click on that and it would show me the comments for those items. 47:34

So that becomes part and parcel of that project I'm always able to see the comments that people made 47:44

Really, really low on time. So just very briefly explain to you what 47:50

The collaboration stream is and how it works. So, the review center is all about or low 47:58

Reviews. It's all about. Yes, I need somebody to sign off on this all this other kind of stuff. 48:02

But there's a lot of other collaboration that goes on and maybe you have a question about something or you just had a meeting with somebody and you want to make sure that the rest of people in the team. And now that

48:12
Know the results of that. And that's what the stream is designed for some of the stream does is allow you to capture all those informal collaboration.

48:21
I'm going to show it to you. Really, really quickly and simply because I don't want to take up all your time. I know that we're actually over right now.

48:29
So, comments are captured on a particular item. So, if I had a question about this particular thing. I may actually go to one that has comments on it.

48:39
If I had a question. I can actually bring it up here. Right. And we can see the entirety of this particular conversation about this specific item. We can also look at this at the project level. And we can also look at this at the

48:54
Organization level, but I'm going to stick right here. So, what I can do is let's say that I need.

49:02
To find that I look at this right and I see that something is missing here. And I don't know if people are actually on top of it. So, I want to make sure that we're on top of this, I can actually go on here, I can say, hey, are we on top of this, right.

49:19
But this would rely on somebody actually going out reviewing the comments. So what we want to do is make sure that that whoever it is that can help us with that is good to know.

49:29
So, I can go to this connected users. I just clicked right here. And that's going to show me.

49:34
Everybody who has commented on it was mentioned that you're subscribed to it things along those lines. And I can mention those people just like that by clicking on them.

49:46
And if I know that there's somebody else I want to, to mention I can use the app side and then I can find them in this list.

50:00
Right.

50:02
And if I really, really, really want their attention.

50:07
I can actually mark this for a specific action.

50:18
I can do that by

50:24
Using this like a whack sign and then I can say, okay, I need. I have a question. Right. And the moment that I put that there. What happens is that that is going to become a part of their homepage. So, when they go into their homepage that stream to their homepage.

50:45
The stream activity shows me all those things where I have been marked to take action. So that was a question right, so I've got three questions that are out there that people are expecting me to answer and I can see them very quickly, just by clicking on that.

51:03
And then if I wanted to answer that question. Maybe I can say, nevermind. We got this covered

51:13
A lot more the stream can do for you. The more that you use that stream, the better off you're going to be in using drama.

51:24
So when you mentioned somebody. This is gonna be the last thing that I say, and then we'll just kind of close, we'll close out

51:31

And when you mentioned somebody, what happens is they're going to get an email, they'll get an email saying, hey, you've been mentioned in the comments.

51:37

And they can actually if they're on the data they can just reply to that email. They don't have to log back in the drama when they reply to that email, it will show up automatically as part of that conversation string.

51:47

And there's a lot more, they can do but we're kind of running out of time is at least get the general idea of it.

51:54

So, hold questions for the second, let me quickly go through the conclusion, and then I'll answer any questions that are outstanding.

52:00

We didn't cover everything today. There's a lot more that can be done. So, if there is something that you want to know if it's possible to do. You've got my email.

52:09

Asked me. Don't worry about email me, I'd be happy to answer it.

52:14

The big takeaway, though, is we're trying to build you a better product development experience and the way that we do that.

52:20

Is actually in through you making a business change getting out in the world of email getting out the world of IM. You are the meanings and using Jama for that, the more that you capture Jama, the more than it's going to help

52:35

If you would like some exercises to segment your understanding, email me, I'd be happy to send them to you. Most of the time people already have projects that are running, then they can play in

52:47

We do have a lot more learning. There's the help in the project or in the products we have a support community and we also have an education portal, there's free training out there as well as subscription train

52:59

come and check us out and have a great rest of your day.