Focal Point Workshop

"Introduction to Focal Point"

Hands-on Exercises - Part 1

June 1, 2009

I. Introduction

This document contains hands-on exercises to be used during the Focal Point Workshop. Each exercise is preceded by an objective, assumptions and a statement of the value provided by its topic. Hands-on steps to be performed are presented in this format:

> *A – 1 This is the format of steps to be performed.*

Screen shots of Focal Point are also provided, with call-outs that mirror the steps to be performed while guiding you to the appropriate area of the application. The screen shots may not appear exactly as your live image, but are intended as a guide in navigating the application.

In general, the exercises must be performed in the sequence presented.

II. Workshop Hands-on Exercises

These exercises assume that you are performing them using the Focal Point Workshop workspace provided to you. A workspace has been configured to give each participant an isolated work area to perform the exercises. Participants will not be able to see data entered by others in the workshop.

It should be stressed that the workspace used for the hands-on exercises is *very minimal* and is not representative of a production environment, nor does it expose all the features and capabilities of Focal Point.

Participants should work with their Account Manager to learn about capabilities of Focal Point that are outside the scope of this Technical Workshop.

EXERCISE A: Logging into Focal Point

Objective: Make sure that you can gain access to the Focal Point server and open a workspace.

Assumption: This step assumes that you have access to a computer with the appropriate versions of a browser and Java Runtime Environment (JRE), an internet connection, and a login name and password provided by your facilitator.

Value: The login name provides users with access to the workspaces of which they are members. Users are assigned to groups and roles which control the information and capabilities to which they have access.

A - 1. Double-click the Focal Point icon on your desktop.

A - 2. Your Login Name = "workshop", the Password = "focalpoint". (Without the double quotes)

A - 3. At the login prompt, enter your user name and password, then click the "Login" button.


Screenshot 1 - Focal Point Login Prompt

Note: When you have access to more than one workspace in the system, upon initial login you are presented with a list of workspaces from which to choose, as shown in Screenshot 2. You open a workspace by clicking its name.

You can always get back to this list by clicking the "Workspaces" link in the control panel at the top of the page. Different workspaces can be used to manage different types of data and/or business processes. Common information can be shared across workspaces.

*A - 4. In your list of available workspaces, click "1. Simple Prioritization" to open it.*
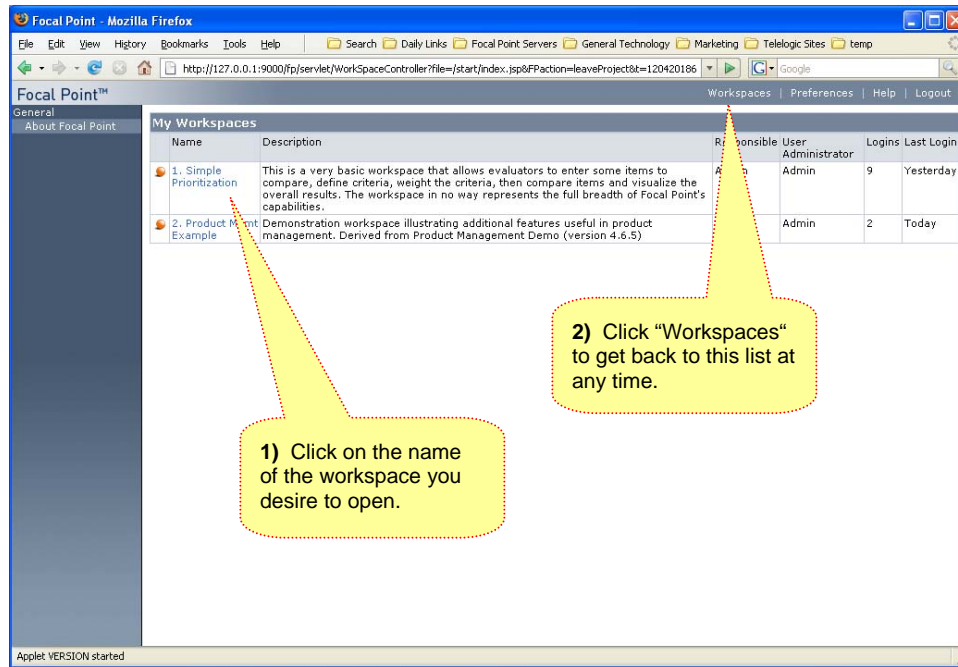
Screenshot 2 - List of Available Workspaces

Note: In Screenshot 3, note the name of the workspace appears in the browser title bar. When you open a workspace, you are presented with your personal "home page" for that workspace that you can customize to show pertinent summary information of interest to you – a "dashboard" of sorts. When a workspace is open, you can always get back to the home page by clicking the "Home" link.

As some simple home page examples, we have included a message view at the top, followed by a statistical view of your items in the system, then a list of your Active criteria, followed by another message view with links to more information.

Again, this is a very simple workspace that will primarily enable you to see how the prioritization and visualization features work. There is some sample data in the system you will work with first, but later you will be instructed how to enter your own data and criteria.
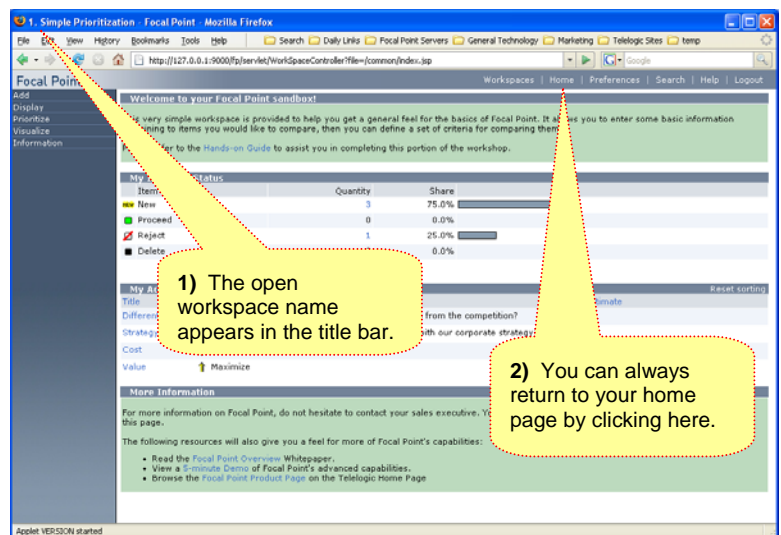
Screenshot 3 - Workspace Home Page

## EXERCISE B: Review Sample Data

Objective: To become familiar with the sample data provided in the workspace

Assumption: You still have the Simple Prioritization workspace open.

Value: This exercise reveals the sample data that is in the system so you will understand how it is used within the workshop.

B - 1. Click the Display > My Items menu. Note the following:

➢ The State of one item in the tree structure is set to "Reject" and as configured will not show up in your other views – a simple example of how views can control access.

➢ The Value and Cost attributes will be mapped to evaluation criteria providing qualitative data in your analysis.

➢ Keep in mind that the collection of attributes and views are highly configurable to meet the needs of your process.
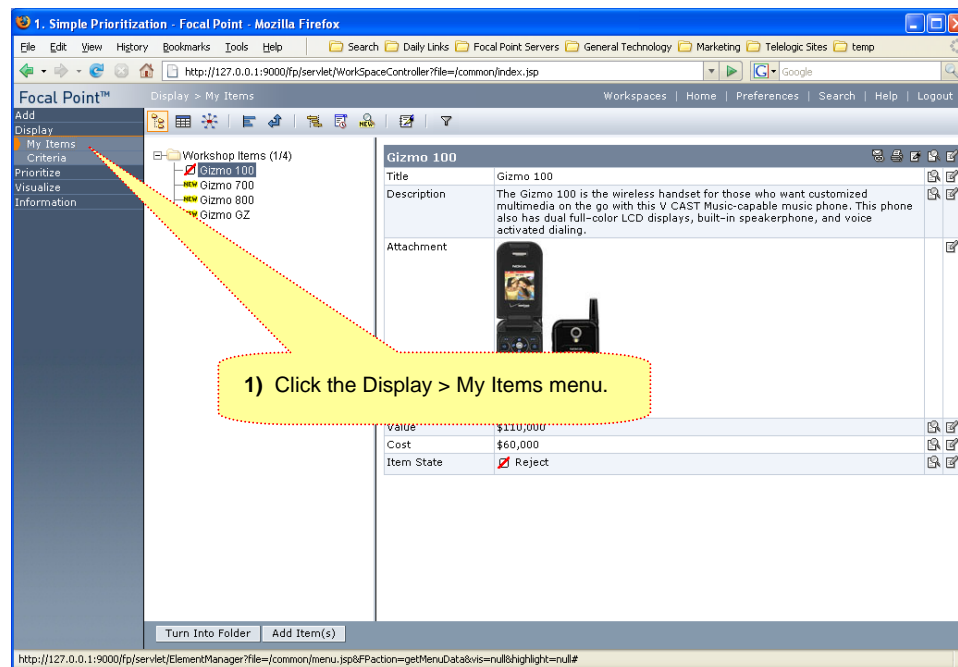
Screenshot 4 - Display Sample Data

B - 2. Click the Display > Criteria menu. Referring to Screenshot 5, note the following:

> ➢ Each criterion objective is set to either maximize or minimize.

> ➢ In this example, only criteria in the Active state will be used in your analysis.

> ➢ The criteria Differentiation and Strategy have questions defined to aid in the comparison process we will see later.

> ➢ The criteria Cost and Value are accessing attributes relating to the sample data we saw in the previous step.

B - 3. Click the "Home" link to return to your home page.
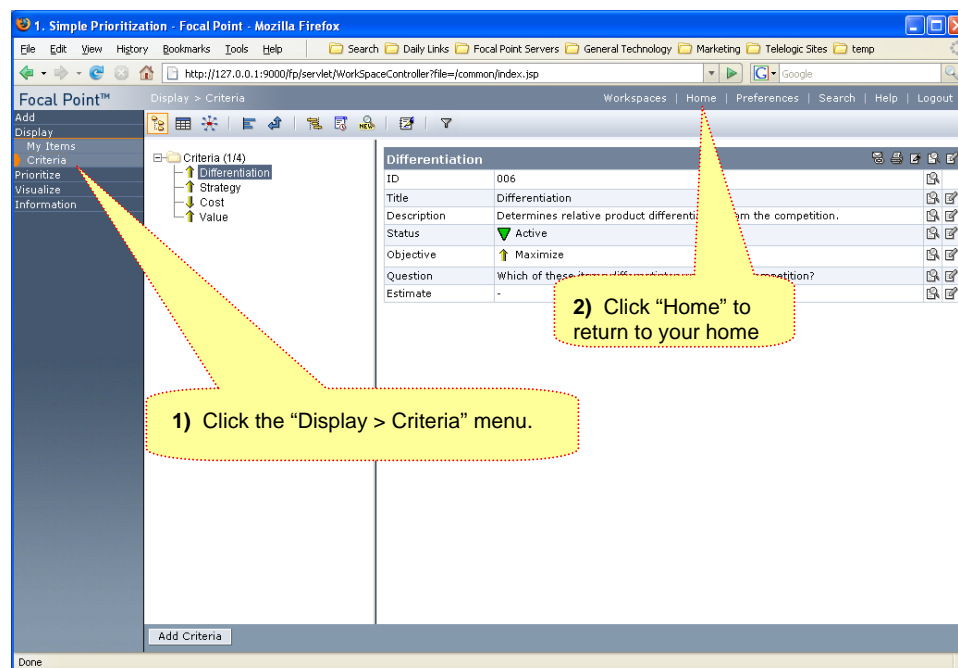
Screenshot 5 - Sample Criteria

B - 4. Note the summary views of the information we just looked at using the Display menu, most notably:

➢ After the introductory message view at the top, the second view is a "statistics" view of the items that you own in the database. It shows the number and percentage of items as they are distributed across the States of this simple process.

➢ Note that you can click on the number in the Quantity column to open a pop-up with the list of relevant items, and that you can further drill down into the data using the hyperlinked data.

➢ The next view is just a listing of the criteria that you own in the system that are in the Active state. These are just a couple of examples of how a custom "dashboard" can be created for each user or user role.

➢ Finally, the message view at the bottom provides you with links to other information that may help you further appreciate the capabilities and flexibility of Focal Point.
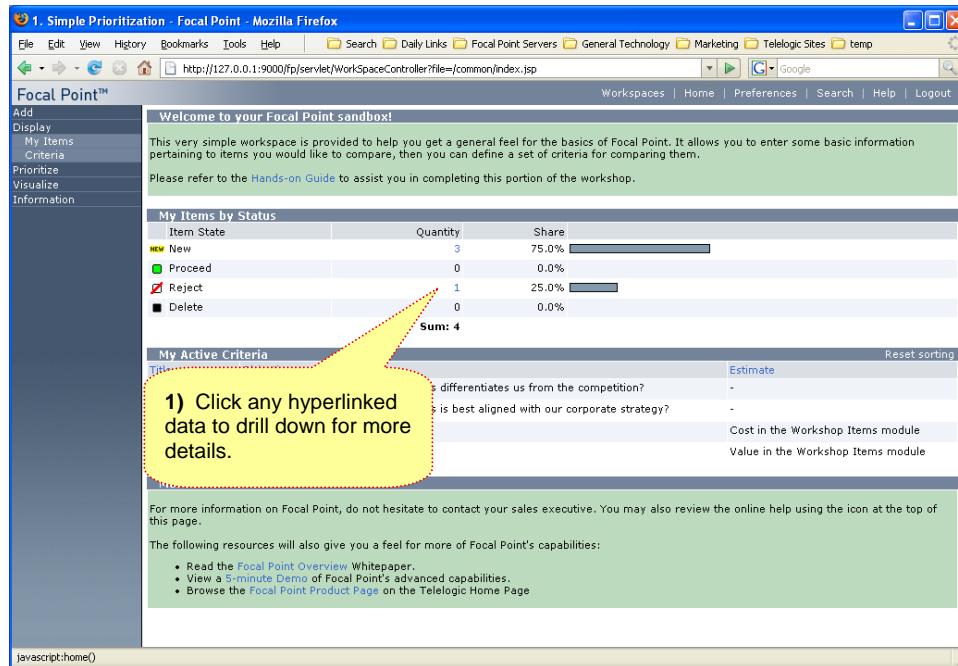

Screenshot 6 - Configurable Home Page

EXERCISE C: Prioritization & Visualization

Objective: Use a simple workspace to prioritize some items and visualize the results.

Value: This exercise provides a good understanding of two types of analysis criteria. Qualitative criteria are presented to the user during a pair-wise comparison exercise, asking them to make subjective judgments of the underlying information. Quantitative criteria extract information relating to the items being compared directly from the database. The two types of criteria can then be combined in any number of Visualizations depending on the analysis to be done.

C - 1. Click the "Prioritize" menu in the left navigation bar to open.

C - 2. Click "New Items".
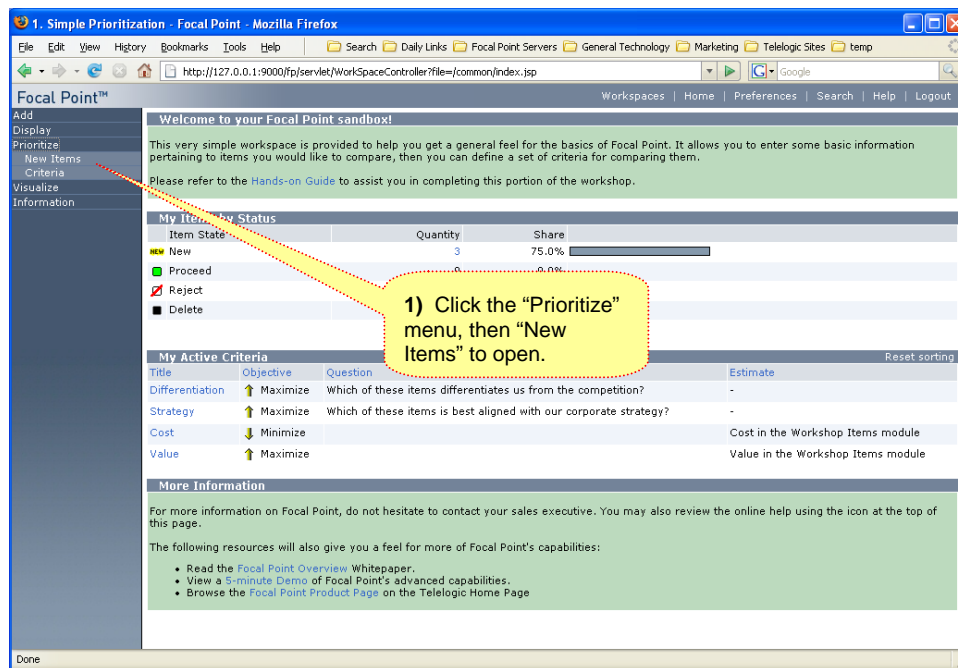
Screenshot 7 - Workspace Home Page

C - 3. As in Screenshot 8, perform the "Recommended Number" of comparisons using the radio buttons to indicate the degree to which the two items meet the criterion, clicking OK each time.
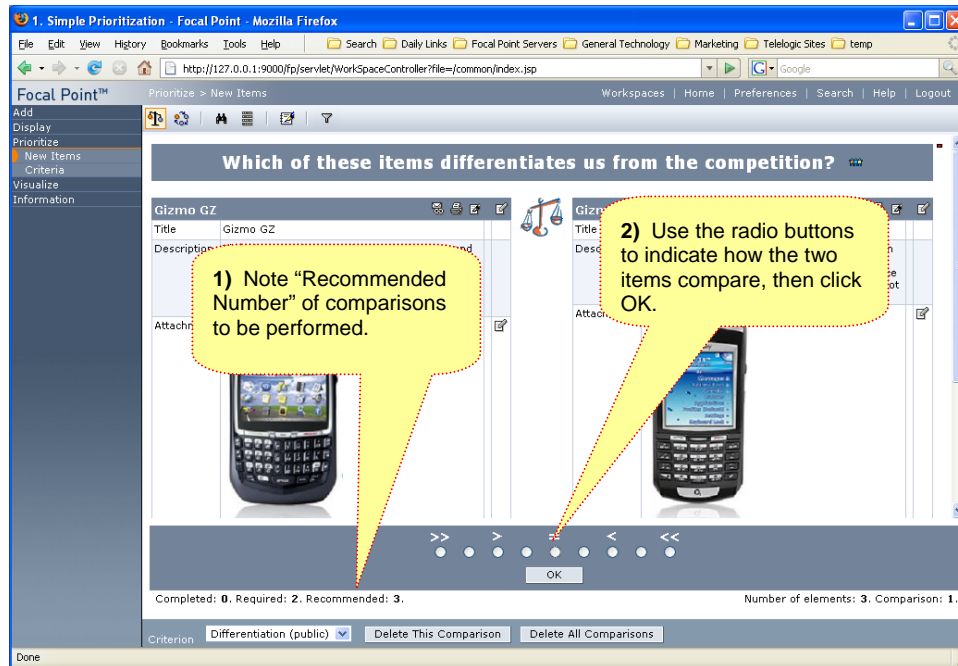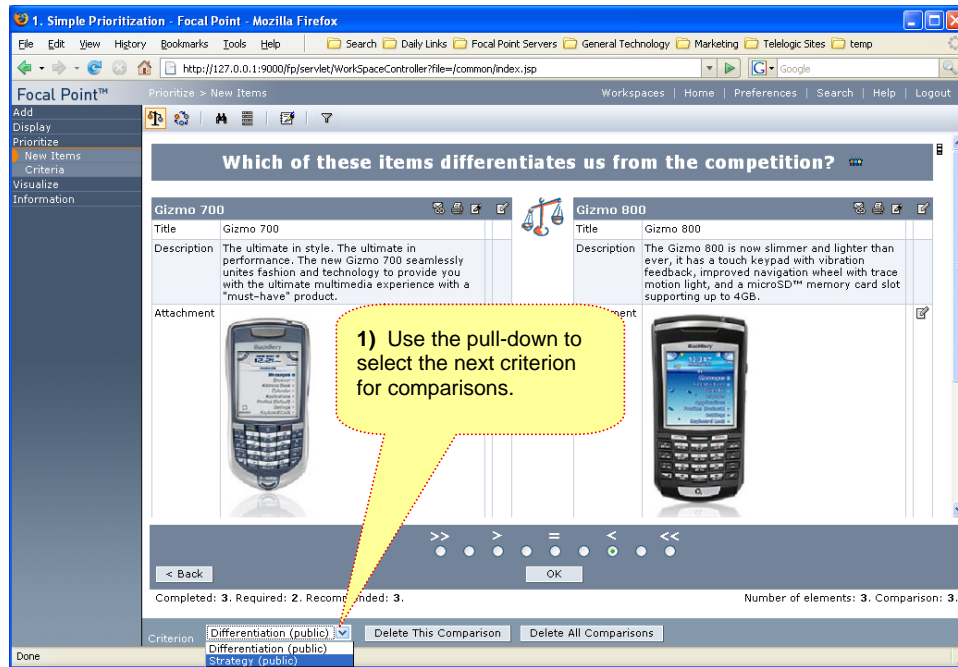

Screenshot 8 - Prioritize New Items

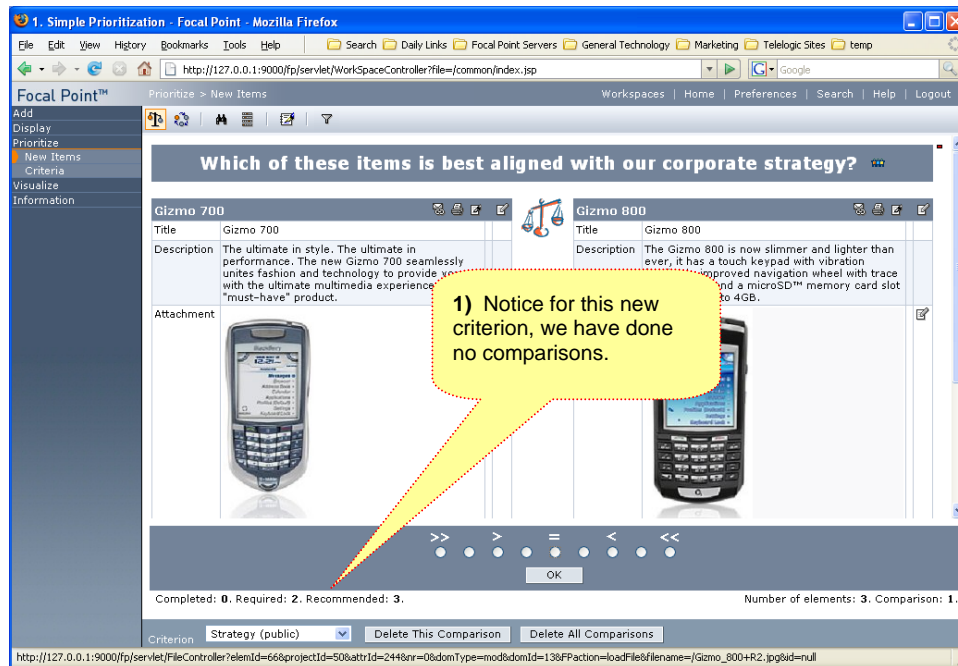*C - 4. When you have completed enough comparisons, click OK on the dialog that appears, as in Screenshot 9.*
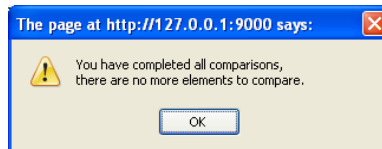
Screenshot 9 - Sufficient Comparisons Notification

C - 5. Use the pull-down at the bottom frame to select the next criterion, as in Screenshot 10.

Screenshot 10 - Select Different Criterion

C - 6. Perform the recommended number of comparisons for this new criterion.
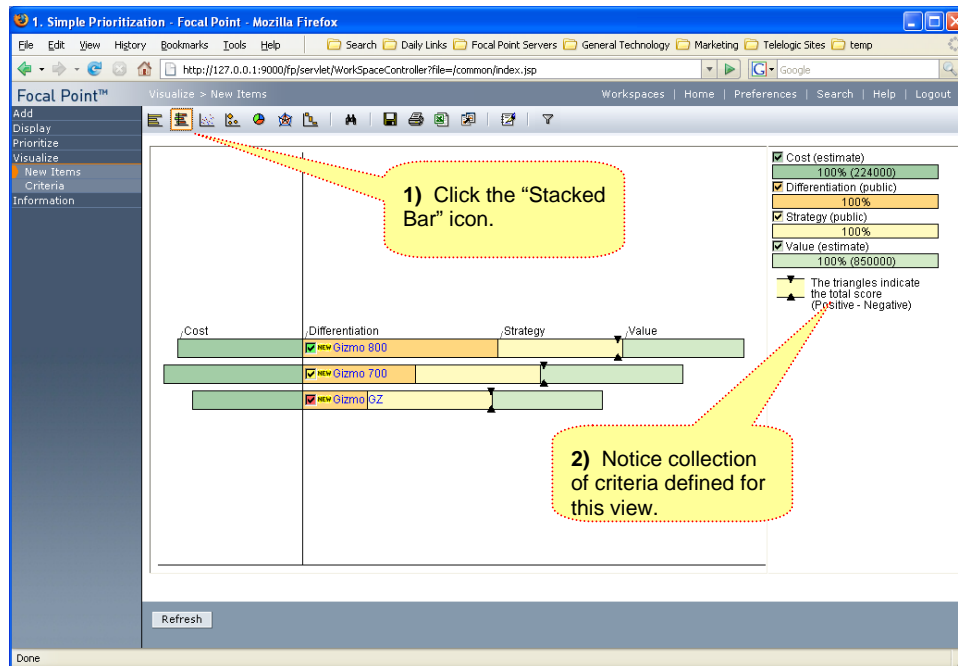

Screenshot 11 - Additional Pair-wise Comparisons

C - 7. Click the Prioritize menu to collapse it.

C - 8. Referring to Screenshot 12, click the Visualize > New Items menu.
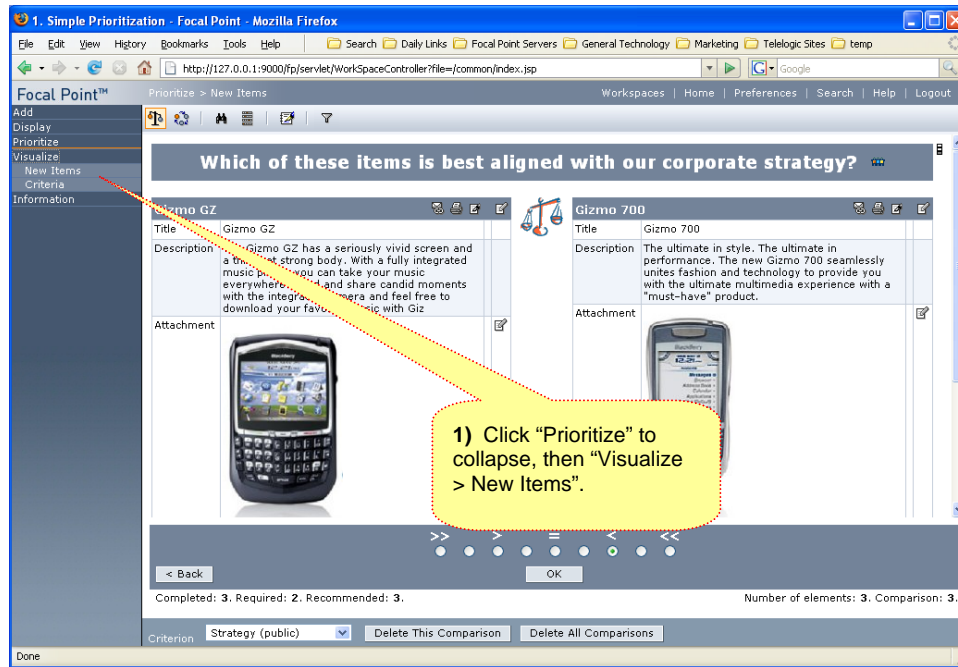

Screenshot 12 - Switching to Visualize View

C - 9. Referring to Screenshot 13, click the "Stacked Bar" icon at the top of the frame and notice the items are ranked based on the criteria to the right.

Screenshot 13 - Visualizing Stacked Bar Chart

C - 10. Referring to Screenshot 14, deselect any items in the lower third of the ranking, indicated by the red checkbox.

C - 11. Notice the degree to which criteria are now fulfilled, providing cost/benefit type analysis.
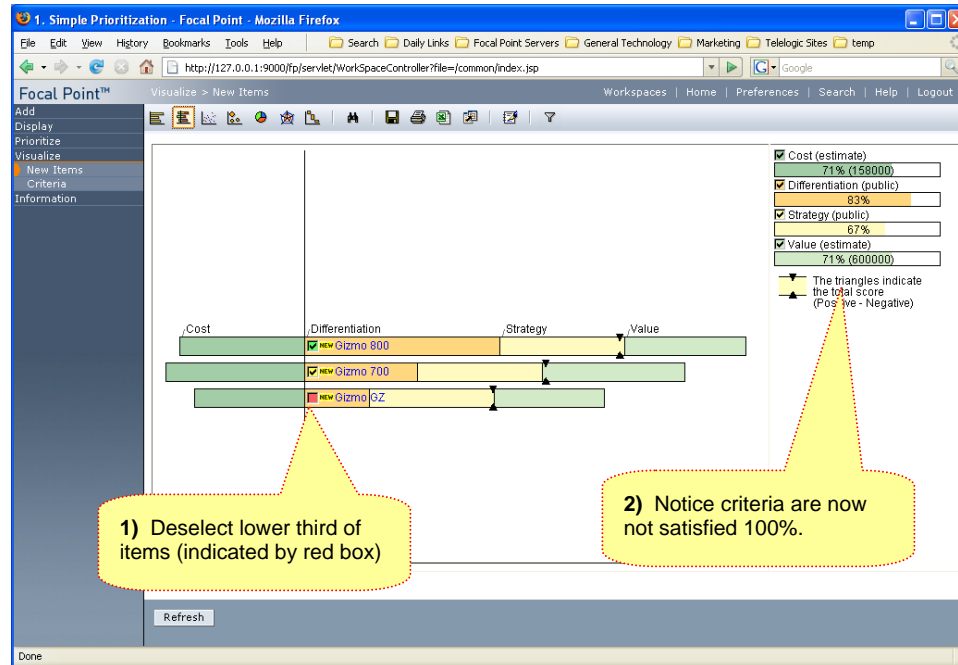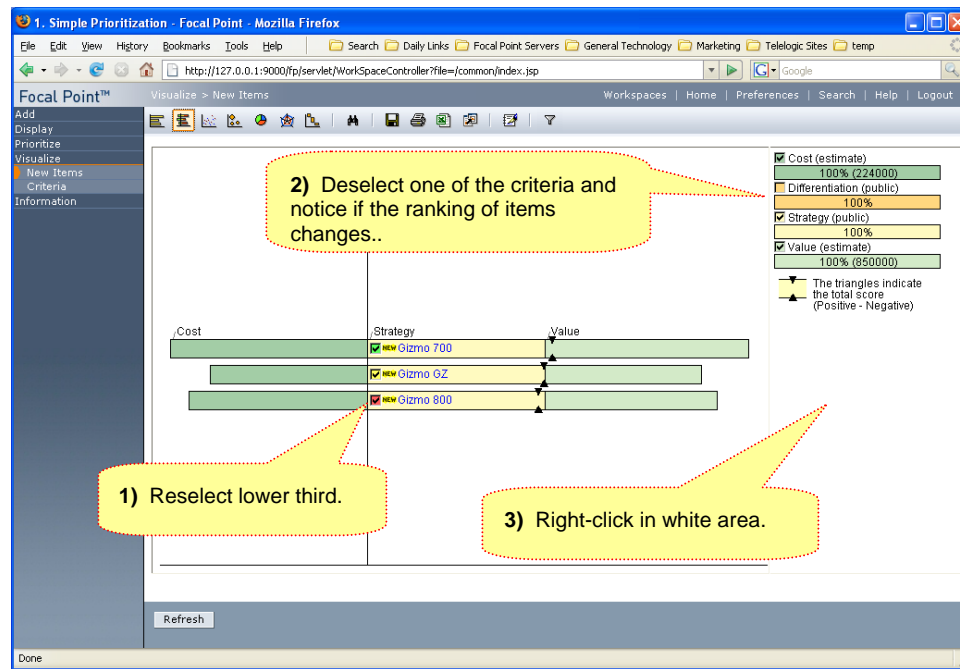

Screenshot 14 - "What If" - Deselecting Items

C - 12. Reselect the lower third items.

C - 13. Referring to Screenshot 15, deselect one of the criteria, removing it from consideration. Notice how the items may reprioritize based on the change in criteria mix.
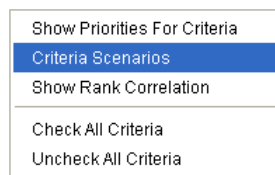
C - 14. Reselect the criterion you deselected.

*C - 15. Right-Click in the white space below the list of criteria.*

Screenshot 15 - "What If" - Remove Criterion from Consideration

C - 16. In the popup menu (Screenshot 16), select Criteria Scenarios.

Screenshot 16 - Enabling Criteria Scenarios (Weighting)

C - 17. Referring to Screenshot 17, notice how all the criteria are currently weighted equally. In the next exercise we will adjust this using pair-wise comparisons. For now we can adjust the weights dynamically.
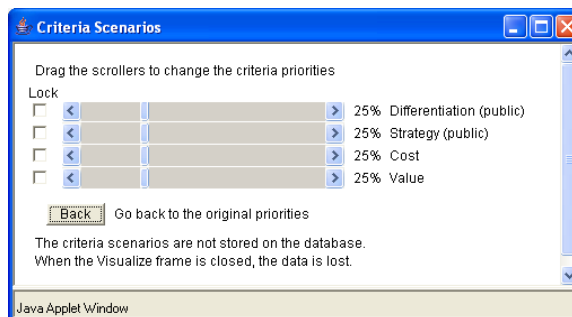

Screenshot 17 - Equally Weighted Criteria

C - 18. Click the "Lock" box next to Cost. Then, adjust the slider on Differentiation back and forth and watch the graph change. Keep an eye on the black triangles – the "aggregate score" indicators – to see if it changes the ranking.

> **Note:** Performing such "what-if" analysis can help you understand the sensitivity of your decisions to the criteria and associated weights being used. It also shows how changes in what is important to the organization can affect decisions.

C - 19. Click the "Back" button in the Criteria Scenarios window, then close it.

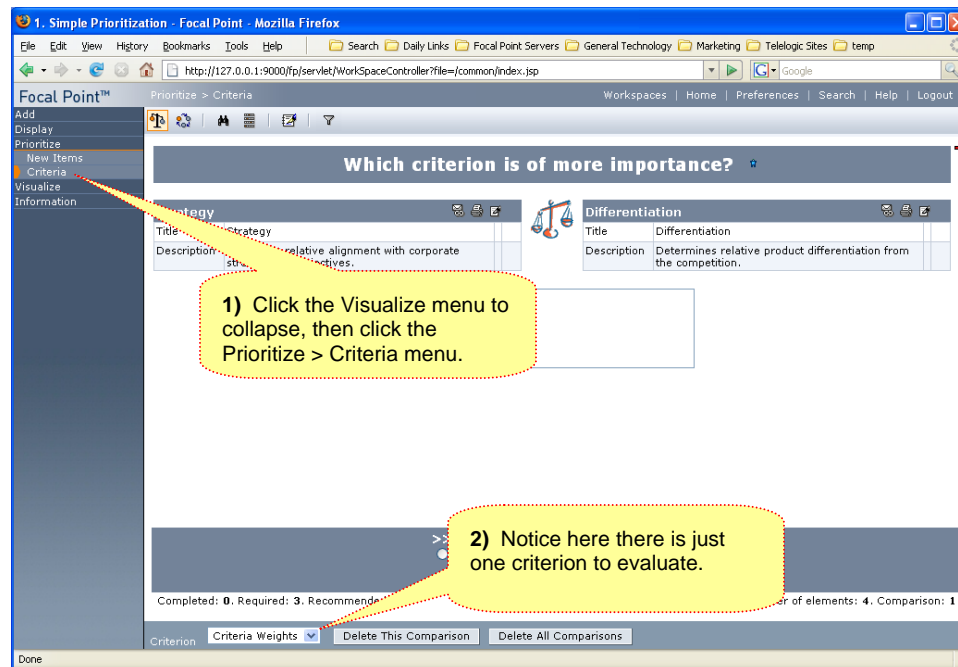*C - 20. Click the Visualize menu to collapse it.*
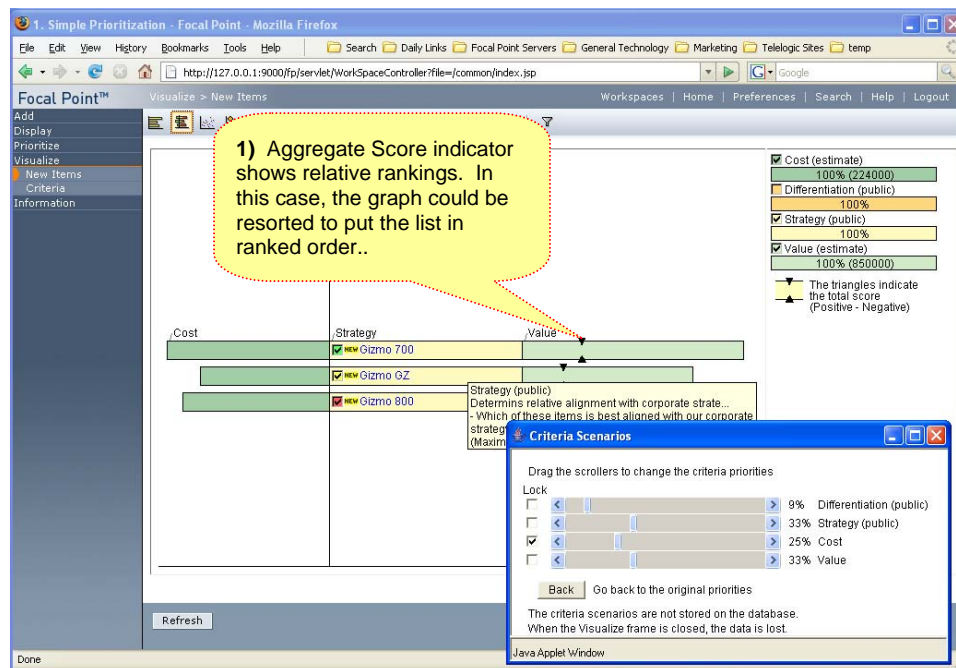
EXERCISE D: Prioritizing Criteria

Objective: To illustrate how you can prioritize criteria that are used to prioritize items, or even other criteria.

Value: Focal Point's ability to implement multiple levels of criteria for prioritization gives organization detailed control of their decision making process.

D - 1. Click the Prioritize > Criteria menu. Notice in Screenshot 18 there is just one criterion to evaluate here – Criteria Weights.

*D - 2. As before, compare the pairs of criteria until you have done the recommended number.*

Screenshot 18 - Comparing Criteria for Weighting

D - 3. Click the Prioritize menu to collapse it.

D - 4. Click the Visualize > Criteria menu to see the resulting criteria weights as in Screenshot 19.

Note: Since there is only one criterion in this view, the "bar chart" and "stacked bar chart" are identical. Also, rather than arriving at weights through pair-wise comparison, you could also configure Focal Point to allow you to enter the desired weights directly.
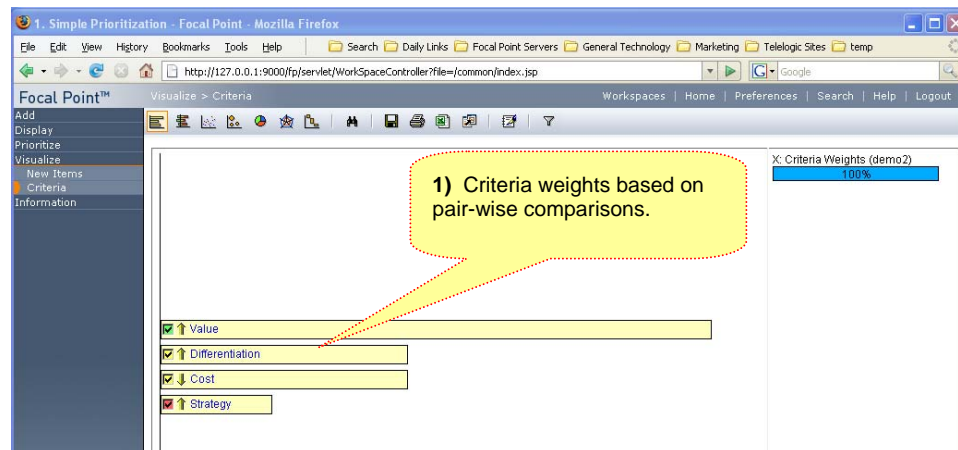
Screenshot 19 - Resulting Criteria Weights

D - 5. Click the Visualize > New Items menu (Screenshot 20).

D - 6. Right-Click the white space under the list of Criteria in the right frame and select "Criteria Scenarios" again.

D - 7. Notice in Screenshot 20 how the criteria are no longer of equal weights as when we first looked at them.

D - 8. You may also notice the ranking of the elements has changed from the previous exercise – it all depends on how you scored the pair-wise comparisons on the items AND criteria.
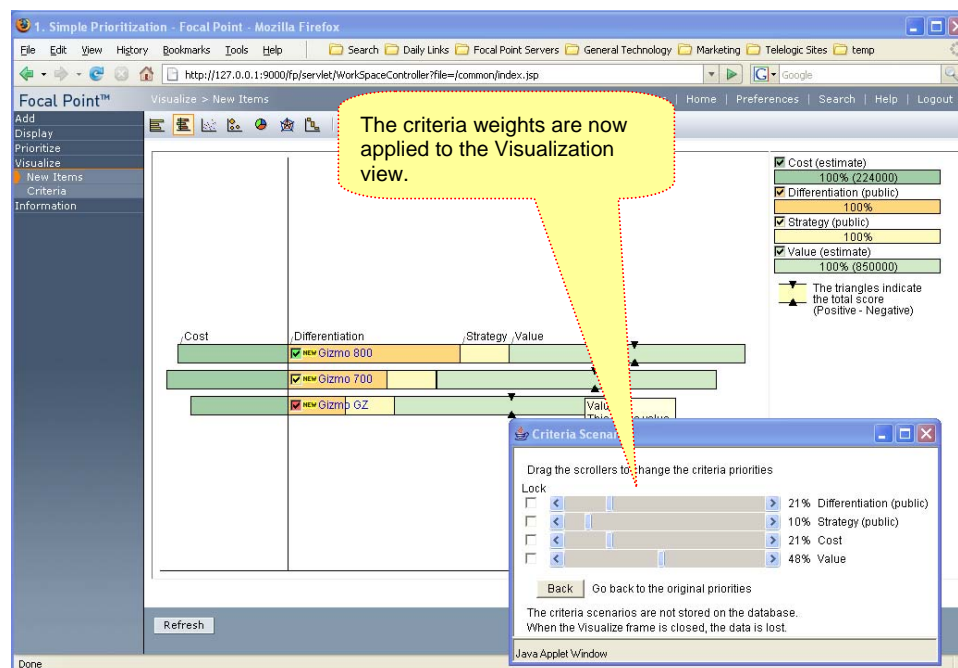
Screenshot 20 - Results with Weighted Criteria

## EXERCISE E: Using Your Own Data

Objective: To allow you to enter some of your own items to evaluate, and to enter custom criteria that might be important to your organization.

Value: Seeing your own data and criteria in Focal Point should help you see how easily Focal Point can adapt to most any of your decision analysis needs, regardless of the type of data being considered..

E - 1. Click the Display > My Items menu.

E - 2. Use Control-Click to select the items with State = New.

*E - 3. Click the Edit icon to the right of the Item State attribute.*
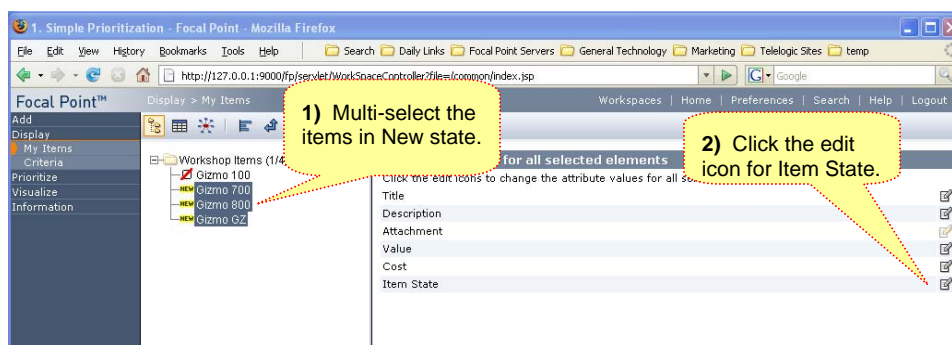
Screenshot 21 - Multi-select Edit

E - 4. Referring to Screenshot 22, set the Item State for these to "Proceed".

E - 5. Click the OK button in the bottom frame.

Note: This can simulate these items moving on in a development process, and in this example they will no longer show up in the Prioritize and Visualize menus. Moreover, this same task could have been done in the Visualize menu by selecting the highest priority items and moving them to the next stage of the process.
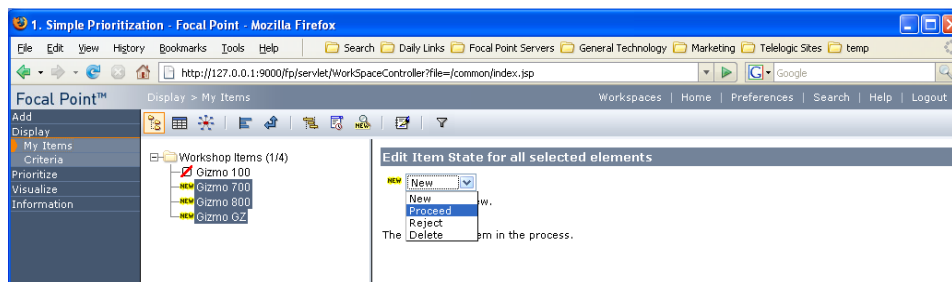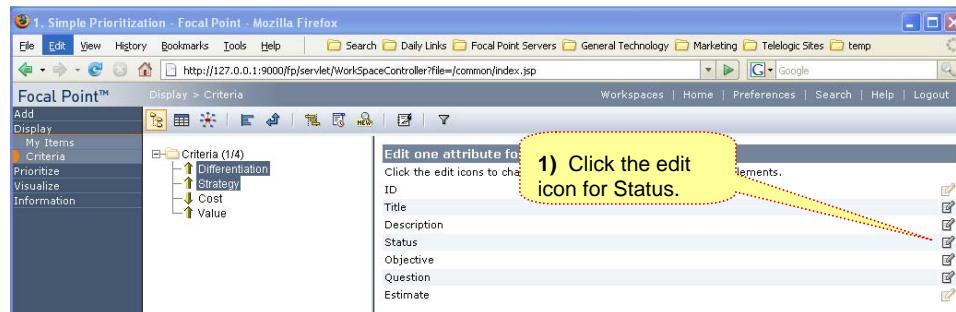

Screenshot 22 - Bulk Change of Item State

E - 6. Click on the Display > Criteria menu (Screenshot 23).

E - 7. Use Control-Click to select at least the Differentiation and Strategy criteria. (We'll assume you no longer want to use Differentiation and Strategy, but you may also disable Cost and Value if you desire).
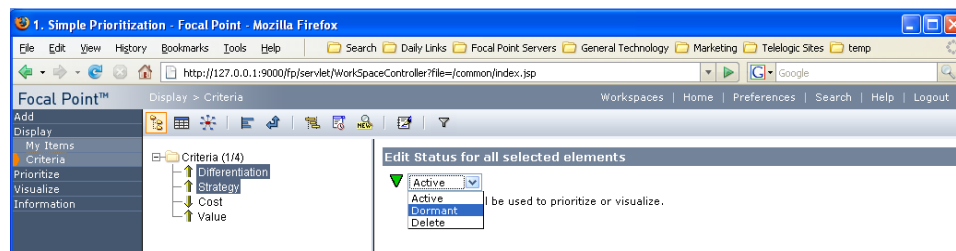
E - 8. Click the Edit icon to the right of the Status attribute

Screenshot 23 – Multi-select Edit of Status

E - 9. In the pull-down, set the Status to Dormant (Screenshot 24). These criteria will no longer show up in your Prioritize and Visualize Views, but can always be re-activated later.

E - 10. Click the OK button in the bottom frame.

**Screenshot 24 - Setting Criteria to Dormant**

E - 11. Note that if you try to Prioritize or Visualize with NO "Active" criteria, you will get an error similar to that in Screenshot 25. We will resolve this later by adding new criteria in the Active state.

Screenshot 25 - Prioritize Error if No "Active" Criteria Exist

E - 12. Referring to Screenshot 26, click the "Home" link at the top of the frame.

*E - 13. Notice how the information there has now been updated based on your changes.*
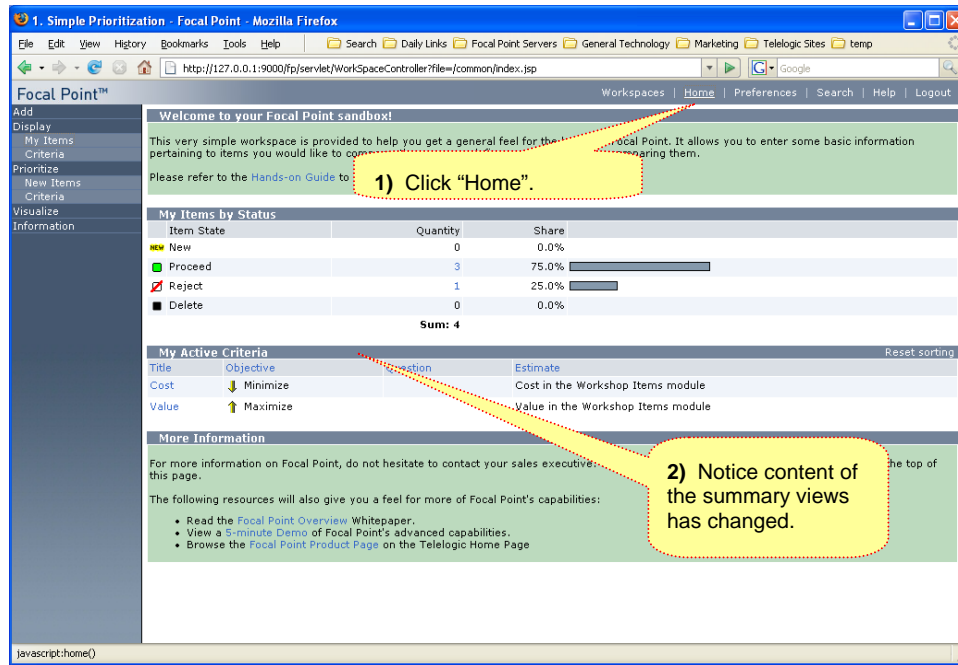
Screenshot 26 - Updated Home Page

E - 14. We will now add YOUR items and criteria for analysis. Click the Add > Item(s) menu.

E - 15. In Screenshot 27, note the "Add Multiple" button in the bottom frame, allowing you to import multiple items from a spreadsheet, but that is outside the scope of this workshop.

E - 16. Repeatedly click Add > Item(s) to enter a few items of your own to be analyzed, considering the following:

➢ These can anything from requirements to products to projects.

➢ You can upload any supporting information in the Attachment field. In the example data you saw the result of entering images.

➢ You only need to fill in Cost and Value if you left those criteria "Active."
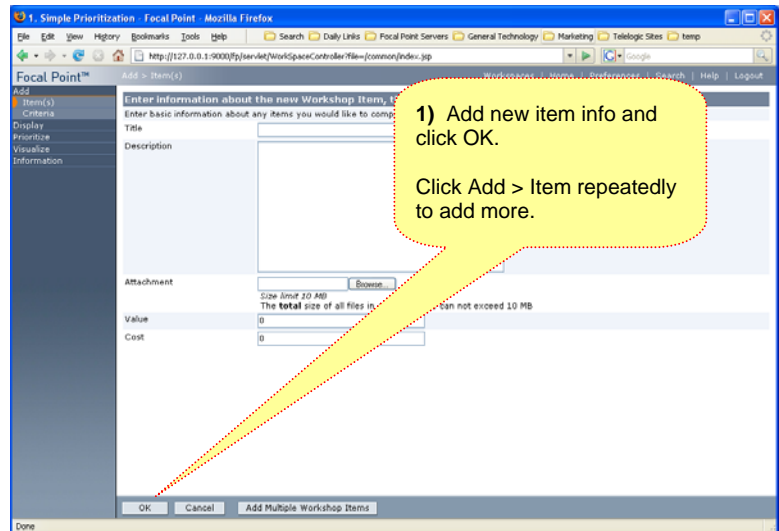
Screenshot 27 - Add New Items

E - 17. Click the Add > Criteria menu.

E - 18. Add your own criteria to be used in Prioritization and Visualization, considering:

➢ Disregard the "Estimate" field as this is outside the scope of this exercise (if shown on the form).

➢ Determine if the criteria should be maximized or minimized.

➢ Phrase the question appropriately. For example, suppose we want to minimize risk. We should create a criterion called "Risk," set the objective to Minimize, and the question should ask, "Which item presents the ___*largest*___ risk?" That question will solicit the proper response from the evaluator such that items with more risk will be rated lower, as we are trying to minimize that criterion.

Screenshot 28 - Adding Your Criteria

E - 19. If you go back to the Home Page, you should see your "New" items and Criteria represented, as in Screenshot 29.

E - 20. Since you prioritized your criteria in Exercise D, you need to repeat those steps to assign weights to your new criteria, else their impact will not be visible in the Visualization view.

E - 21. Now Repeat Exercise C to prioritize your New Items using YOUR criteria. Don't forget to perform the comparisons for ALL Criteria you defined (using the drop down at the bottom of the Prioritize page). You can then visualize your results.
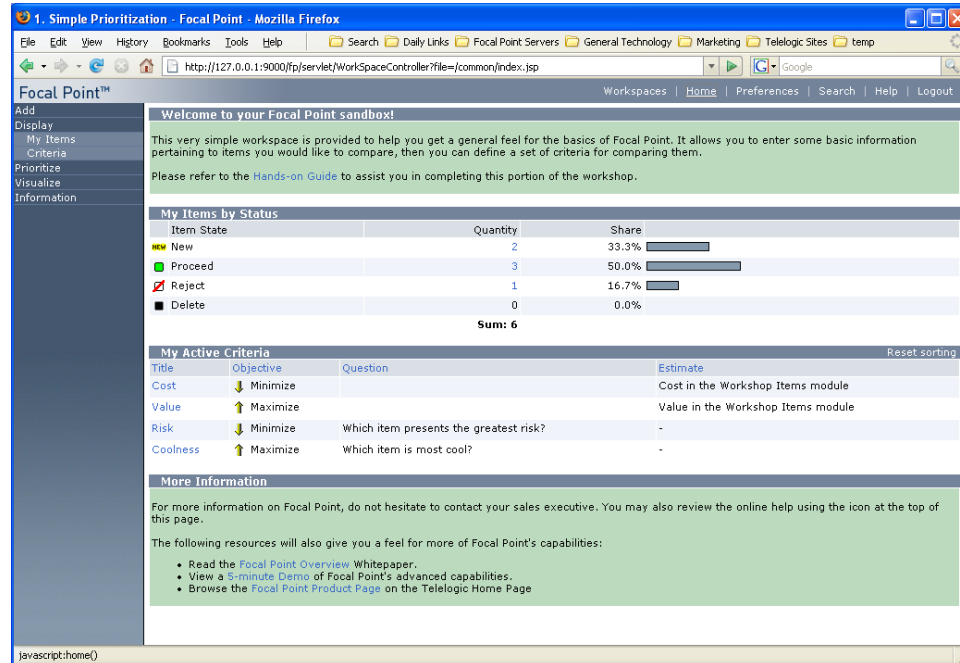
Screenshot 29 - Updated Home Page

To DELETE an item or criteria, double-click in its State or Status field, set it to "Delete" and click the "Save" icon. This removes it from all your views, but archives it such that it can be restored later if needed.

E - 22. LOGOUT when you are done with Focal Point to immediately release the license.
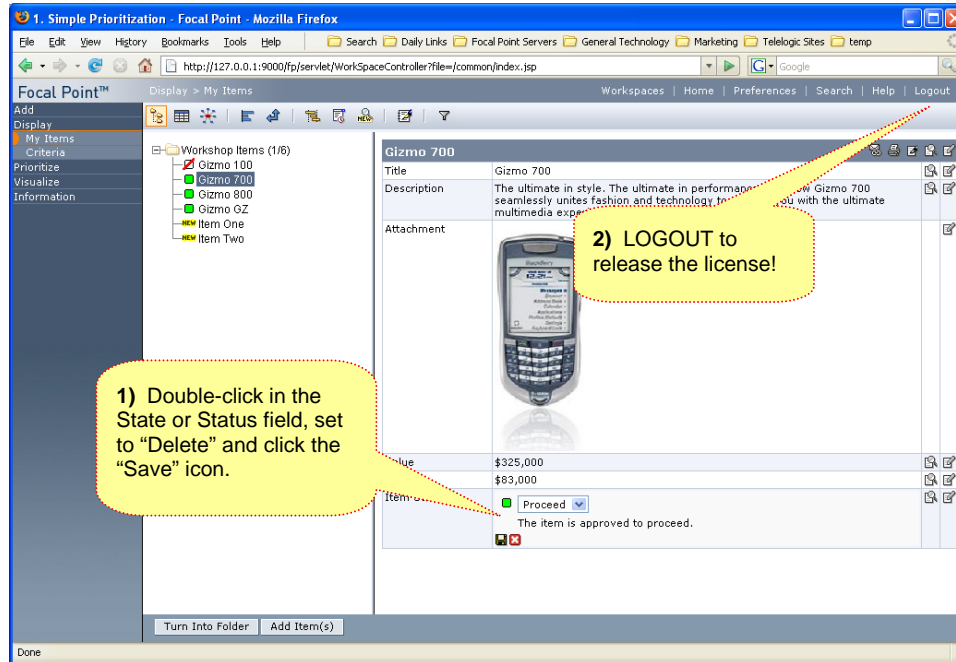
Screenshot 30 - Setting Status to "Delete"

EXERCISE F: Getting Further Information

Objective: To provide you with access to more detailed information regarding Focal Point.

Value: The Workshop workspace you have been working with was purposefully kept very simplistic, and as such provided only a glimpse of the potential value Focal Point could bring to your organization. If you have further questions, do not hesitate to contact your Account Executive and/or Sales Engineer.

Additionally, follow the steps below to get more information about Focal Point.

*F - 1. Return to your Home Page in the Simple Prioritization workspace.*

F - 2. Notice the message view at the bottom with three useful links, notably:

➢ A hyperlink to a summary of Focal Point's features in white paper format.

➢ A link to a 5-minute video on our website highlighting some of the value provided by Focal Point.

➢ A link to the Focal Point product page on our website where even more information can be obtained.
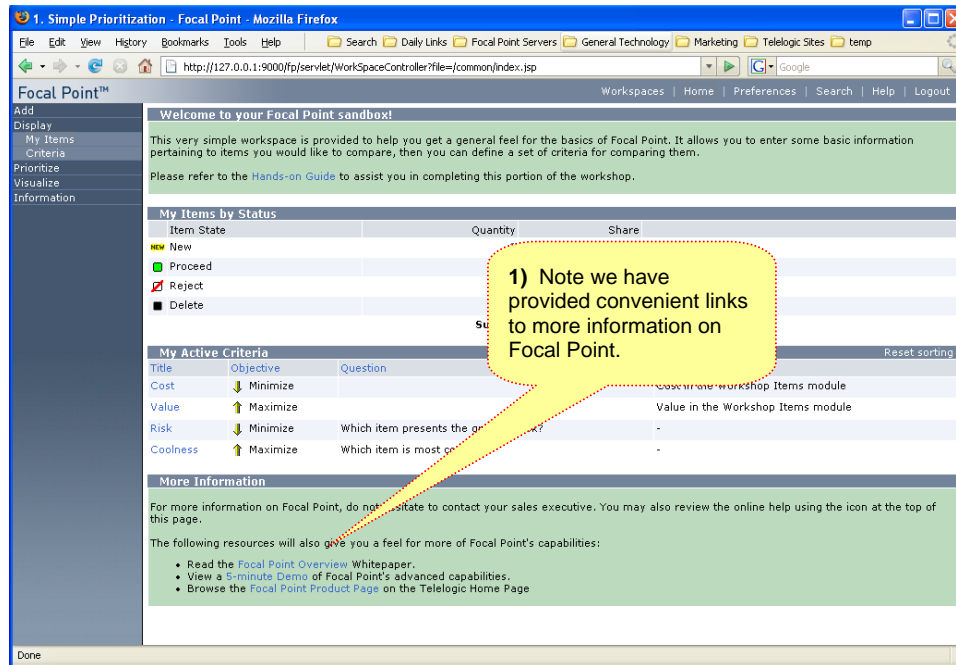
Screenshot 31 - Links to Further Information

F - 3. You may also peruse the Online Help. Just click the "Help" button on the toolbar.
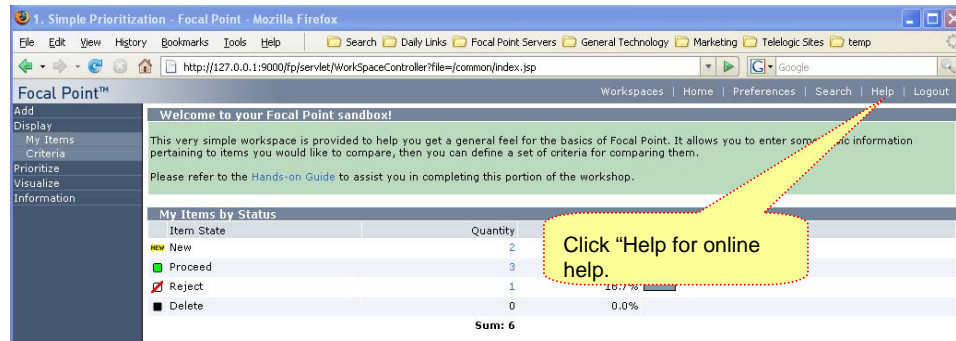
F - 4. Expand the menus on the Navigation Bar to read help, or Search for specific topics.