



## **VisibleThread Quick Start Guide**

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**Table of Contents**

1	Understanding 'Document Sets' and 'Reference Best Practices'	3
2	Quick start Guide – Key Usage Scenarios	3
2.1	Create New Document Set	3
2.2	Create a New Document	4
2.3	Add an Existing Document	4
2.4	Create new Structure Reference Practice based on your Document	5
2.5	Create a new Best Practice from scratch (or by duplicating an existing practice)	5
2.6	Associate Document Set (or Document) with a Structure Best Practice	6
2.7	Create New Users	7

## 1 Understanding 'Document Sets' and 'Reference Best Practices'

The core concepts at play in VisibleThread are **Document Sets** and **Reference Best Practices**. Together, these offer an understanding of how compliant a given set of documents are from a **Structure, quality and concept** perspective.

1. Document Sets: A document set is a collection of related documents associated with a **project** or **initiative**.

The collection of all Document Sets (projects) can be thought of as equivalent to a **Program** or **Portfolio**.

Given that a document set is in essence a collection of documents (BRDs, Tech specifications, Test Plans), one of the first things you will look to do is to create a new document set and then start adding documents.

Full details on how to do this is outlined in the next section.

Document sets are associated with reference practices which determine the treatment of the content.

2. Reference Practices: Reference practices come in three forms: Structure Best Practices, Quality Best Practices and Concept Lists.

1. **Structure Practices** focus on verifying that particular types of Structural components are present within the document (s).

For instance, if defining a transaction oriented system e.g. an online tax system, a billing system, then absence of performance and security 'non-functional' requirements exposes high levels of risk at an early stage. You would create a Structure Best Practice with appropriate headings (security, performance etc.). This then helps validate that these types of content are present in the documentation.

Structure Practices can be associated with both document sets and specific documents.

2. **Quality Practices** focus on categorized term sets that if found, indicate potential risk issues in the document (s). For instance, the term 'appropriate' and 'high' in the context of the following sentence is impossible to measure and test for, e.g. 'we must deliver appropriate levels of uptime, given high user volumes'. This type of language introduces high risk of poorly architected IT systems and heightens the probability of late stage architectural rework and poor user experience.

Much of the quality Best Practice relates to fuzzy and ambiguous language of this nature.

Quality Practices can be associated with both document sets and specific documents.



3. **Concept Lists** allow you specify particular categories of terms / phrases that you may have an interest in tracking. If looking at a financial system for example, one might define a Concept List that tracks occurrences of terms and phrases like 'trade', 'deal', 'client' etc.

Concept Lists can be associated with document sets.

## 2 Quick start Guide – Key Usage Scenarios



Here we cover a number of standard usage scenarios for those wishing to start immediately.

### 2.1 Create New Document Set

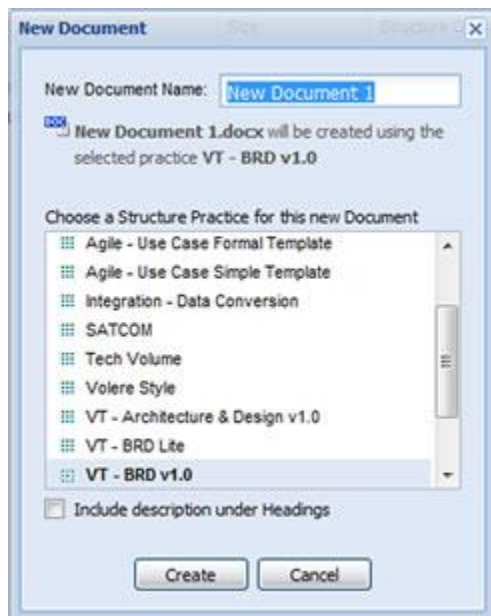
Step	Notes/Tips
1. Click on the  'Document Sets' area in the navigation pane	
2. Click the  'New Document set' button  Enter the name you want to call your doc set which should correspond with the general intent of the documents, for instance we might call it 'Policy Quote System'.	

## 2.2 Create a New Document

Step	Notes/Tips
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1. Click on the  'Document Sets' area in the navigation pane
2. Select the Document Set, that will contain the new document
3. Click the  'Create New Document' button, at which point a drop down sub-menu appears. Select the 'Create New Word Document...' option.

Clicking this button will present you with a dialog box titled 'New Document'.





Here you have the option of selecting a structure practice and specifying a document name.


When done, click the 'Create' button.

4. The system will create the file using the structure you have specified.

## 2.3 Add an Existing Document

Step	Notes/Tips
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1. Click on the  'Document Sets' area in the navigation pane
2. Select the Document Set you want to add to
3. Click the  'Add Document' button


Clicking this button will present you with a dialog box, where you have the option of adding one or more files. Choose each file by clicking the  'Add' button at the bottom left. As you add files you will see the upload progress represented.


When done click the 'Close' button

**Note:** Once you have added the file(s), a quality and discovery analysis is automatically conducted on that file.

4. Once the document(s) are added, the dashboard will display the new docs. Quality and Discovery analysis is available for the document and in the case of Word 2007 formatted documents (.docx) structure is also available.





**Note:** For MS Word 2003 documents, to see structure analysis, you need to launch the document in MS Word first.

**Note for MS Word 2003 user only:** For MS Word 2003 documents, structure analysis is not available until you launch the document in the MS Word Add-in. This is indicated by the following icon in the navigation tree 


To see structure analysis you must launch MS Word by selecting the document and clicking the  button.



Instructions for downloading the Add-in are in section: **Error!**  
**Reference source not found. Error! Reference source not found.**

## 2.4 Create new Structure Reference Practice based on your Document

Step	Notes/Tips
1. Click on the  'Document Sets' area in the navigation pane	<b>Note:</b> To create a Structure Reference Practice, structure analysis must exist. See section 2.2 Create a New Document
2. In the navigation tree, select the document that you want to use as basis for the new Reference Practice	
3. For MS Word 2003 documents, if structure analysis is not available, indicated by the  icon in the navigation tree, then launch MS Word. This downloads the document and performs an automatic structure analysis. Once done switch back to the dashboard	<b>Note:</b> Skip this step if structure analysis has already been performed.
4. In the 2 <sup>nd</sup> pane under the 'Structure Analysis' tab, click the  'Create new Best Practice from Current Document' button.  When you click the button, the system presents a dialog box prompting you to enter the Best Practice name. Once you click ok, the system creates a new best practice with the name entered. This Best Practice uses the structure as represented in the Document. Additionally the system will prompt you to apply this Best Practice to this document	
5. Edit the Best Practice as needed, by navigating to the  'Best Practices' area in the navigation pane and highlighting the newly added practice	<b>Note:</b> See section: <b>Error!</b> <b>Reference source not found. Error! Reference source not found.</b> for full details on how to edit a Best Practice

## 2.5 Create a new Best Practice from scratch (or by duplicating an existing practice)


Step	Notes/Tips
1. Click on the  'Reference Practices' area in the navigation pane	
2. Select either 'Structure Practices' or 'Quality Practices' items in the navigation area	

- Click the  'New Best Practice' button to create a new empty Best Practice or click  to duplicate an existing Best Practice.

When you click either button, the system presents a dialog box prompting you to enter the Best Practice name. Once you click ok, the system creates a new best practice with the name entered



- Edit the Best Practice as needed

**Note:** See section: '6 Best Practices' for full details on how to edit a Best Practice.

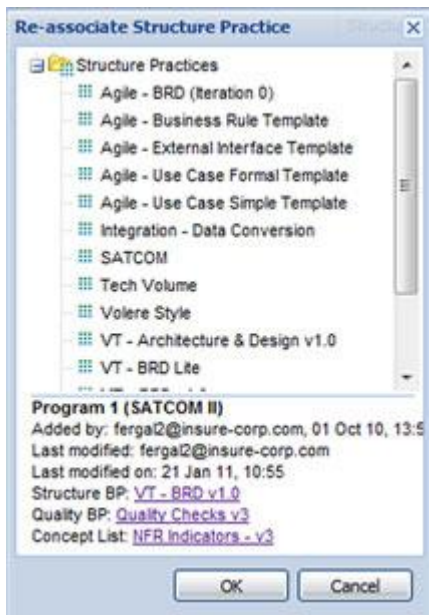
- Click on the  'Save' to save any changes you made Best Practice

## 2.6 Associate Document Set (or Document) with a Structure Best Practice

Step	Notes/Tips
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- Click on the  'Document Sets' area in the navigation pane
- Select the Document Set or the Document (in the case of Structure Best Practice)
- Click the  button, at which point a drop down sub-menu appears. Select the 'Associate Structure Practice...' option.

Clicking this displays a dialog box with a Tree showing the list of Structure Practices.



Select the Structure Practice that you want to re-associate.

As you select the Practice you want, the text area at the bottom is updated accordingly.

- Once satisfied with choices made, click 'OK' and the chosen practice

will be associated with the current Document Set or Document and a re-analysis will happen automatically.

## 2.7 Create New Users

Step	Notes/Tips	
1. In the dashboard, click on the 'User Admin' link at the top right of the dashboard	<b>Note:</b> If you do not see this link appear, this indicates you are not an 'admin' user. Contact your VisibleThread administrator to request administrator privileges	
2. You will see the list of users currently set for this account. Click the 'Add User' button on the top left.		
3. Once satisfied with changes made on the detail screen on the right, click 'Update'.		