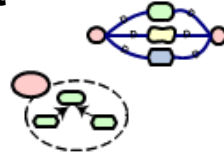


Practical Applications of i* in Industry: The State of the Art



Mini-tutorial @ RE'13 Rio de Janeiro
July 19, 2013



Eric Yu
U. Toronto
Canada



Daniel Amyot
U. Ottawa
Canada



Gunter Mussbacher
McGill Univ.
Canada



Xavier Franch
U.P. Catalunya
Spain



Jaelson Castro
U.F. Pernambuco
Brazil

A quick survey

- You ...
 - Have never heard of i*/GRL/Tropos ...until RE13
 - Know about “Goal-Oriented” RE (i*, KAOS, NFRf, ...)
 - Have used i* ... at least on paper
 - Have used i* in real-world projects
 - Have questions or issues about i* /Tropos /GRL...
 - Attended MIP session (Wed @ 16:30) talk on i*

Agenda

- Eric
 - Quick overview about i*
 - i* tools, resources
 - Small Exercise
- Jaelson
 - Agile
 - Software product lines
- Xavier
 - System architecture
 - Software ecosystems
- Daniel & Gunter
 - Business process and performance modeling (KPIs)
 - Compliance monitoring
 - Context-aware & adaptive systems
- Renata
 - Ontology development for systems interoperability



strategic actors relationships modeling – an overview



Eric Yu
University of Toronto
Toronto, Canada





"Early" Requirements Engineering

- Concerned about ...
 - Understanding the socio-technical context
 - Uncover hidden assumptions - avoid solving the wrong problem
 - Relating systems options to business and organizational objectives
 - Exploring alternatives, analyzing consequences
 - Supporting change

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Usage contexts of i* modeling

- Early RE
- Business process modeling
 - Business modeling
- Security, Privacy, Trust,
 - Compliance
- Software methodologies (eg. Tropos)
 - Software processes (e.g., agile)
 - Software ecosystems
- Requirements to architecture
 - Software product lines

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Industry applications presented at **iStar Showcase 2011 (London)**

<http://tinyurl.com/istarshowcase11>

- **Using i* Modelling as a Bridge between Air Traffic Management Operational Concepts and Agent-Based Simulation Analysis**
- **James Lockerbie** (City University London), David Bush (NATS, UK), Neil Maiden (City University London), Henk Blom (National Aerospace Laboratory (NLR), The Netherlands), Mariken Everdij (National Aerospace Laboratory (NLR), The Netherlands)
- **Evaluating the Impact of Evolving Requirements in HIV/AIDS monitoring systems in the UK**
- **Jorgen Engmann** (Health Protection Agency/UCL), Neil Maiden (City University London), James Lockerbie (City University London)
- **Agile Software Practices - Pre-adoption Analysis Using Strategic Modeling and Empirical Knowledge**
- Hesam Chiniforooshan (University of Toronto), Eric Yu (University of Toronto), **Maria Carmela Annosi** (Ericsson Research Italy)

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... **Business and innovation**

- **Designing the Trentino Innovation Network: Applying Tropos to TasLab**
- **Fabiano Dalpiaz** (University of Trento, Italy), Paolo Giorgini (University of Trento, Italy), Valentina Ferrari (Informatica Trentina, Italy), Stefano Tinella (Informatica Trentina, Italy)
- **Analyzing Requirements for Online Presence**
- S. M. Easterbrook (Department of Computer Science), E. Yu (Faculty of Information, University of Toronto), J. Aranda (Department of Computer Science, University of Victoria), **J. Horkoff** (Department of Computer Science, Faculty of Information, University of Toronto, CA), M. Strohmaier (Knowledge Management Institute, Faculty of Computer Science at Graz University of Technology), Y. Fan (Department of Computer Science), M. Leica (Department of Computer Science), and R. A. Qadir (Faculty of Information, University of Toronto)
- **Using URN and Key Performance Indicators for Performance Management in Small and Medium Enterprises**
- Alireza Pourshahid (IBM Canada and SITE, University of Ottawa), Daniel Amyot (SITE, University of Ottawa), Greg Richards (Telfer School of Management, University of Ottawa), Heather Meek (Boomerang Kids)

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... Healthcare

- **Proactive Adverse Event Management in Healthcare**
- Saeed Ahmadi Behnam and Daniel Amyot (University of Ottawa), Alan J. Forster (The Ottawa Hospital)
- **Collaborative social modeling for designing a patient wellness tracking system in a Nurse-Managed Health Care Center**
- Y. An (iSchool at Drexel), P. Gerrity (College of Nursing and Health Professions), P. W. Dalrymple (Institute for Healthcare Informatics, iSchool at Drexel, Drexel University, Philadelphia USA), **J. Horkoff** (Department of Computer Science, Faculty of Information, University of Toronto, CA), M. Rogers (iSchool at Drexel), E. Yu (Faculty of Information, University of Toronto, CA)
- **Bridging User Privacy Goals and the Privacy Features of Personal Health Records Systems**
- Reza Samavi (University of Toronto, Canada), Thodoros Topaloglu (Rouge Valley Health System, Ontario, Canada)



... Civil and mechanical engineering

- **Modelling Requirements for an Integrated Management System for Civil Construction**
- Fernanda Alencar (Dep. Eletrônica e Sistemas), **Jaelson Castro** (Centro de Informática), José Roberto R de Menezes (Dep. Engenharia Civil,
- Universidade Federal de Pernambuco, Brazil), José Jeferson R Silva3, Emanuel Santos (Centro de Informática)
- **Managing Requirements Knowledge - a Case Study on Control Systems**
- **Dominik Schmitz** (RWTH Aachen University), Matthias Jarke (RWTH Aachen University and Fraunhofer FIT), Hans W. Nissen (Cologne University of Applied Sciences), Thomas Rose (Fraunhofer FIT)



... Software and system development

- **Architecting hybrid systems: the Etapatelecom and Cuenca Airport cases**
- Juan Pablo Carvallo (Universidad del Pacífico, Cuenca, Ecuador),
Xavier Franch (Universidad Politécnica de Catalunya, Barcelona, Spain)
- **Modeling Requirements with i* in the Development of a Data Warehouse for a University**
- Paul Hernández (Lucentia Research Group Universidad de Alicante, Spain), Alicia Castro (Universidad de La Frontera, Chile), Jose-Norberto Mazón (Lucentia Research Group Universidad de Alicante, Spain), Juan Trujillo (Lucentia Research Group Universidad de Alicante, Spain), Carlos Cares (Universidad de La Frontera, Chile)
- **Understanding Stakeholders' Viewpoints in Enterprise SOA**
- **Daniel Gross**, Eric Yu (University of Toronto), Sharon Volk (The Pheonix Insurance, Tel Aviv, Israel), Sharon Al-Al (The Pheonix Insurance, Tel Aviv, Israel)

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... Compliance and Assurance

- **Regulatory Compliance of Requirements of Health Care Information Systems - Experience with Nomos**
- Alberto Siena (University of Trento), G. Armellini (GPI srl), G. Mameli (FBK-irst, Trento, Italy), John Mylopoulos (University of Trento),
Anna Perini (FBK-irst, Trento, Italy), Angelo Susi (FBK-irst, Trento, Italy)
- **Assurance Requirements for Public Services**
- **André Rifaut**, Eric Dubois, Sylvain Kubicki, Sophie Ramel (Public Research Centre Henri Tudor, Luxembourg)

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... Security and Trust

- **Modelling Trust and Security Requirements: the Air Traffic Management Experience**
 - Elda Paja (University of Trento, Italy), **Fabiano Dalpiaz** (University of Trento, Italy), Paolo Giorgini (University of Trento, Italy), Stéphane Paul (Thales Research and Technology, France), Per Håkon Meland (SINTEF, Norway)
- **Using Secure Tropos to Develop a Pre-Employment Screening System**
 - **Shareeful Islam** (School of Computing, IT and Engineering, University of East London), Haralambos Mouratidis (School of Computing, IT and Engineering, University of East London), Miao Kang (PowerchexLtd)
- **Modeling and Analysis of White-Box Security Patterns in i***
 - **Golnaz Elahi** (University of Toronto), Eric Yu (University of Toronto), Yuan Xiang Gu (Irdeto Canada)

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i* basic concepts



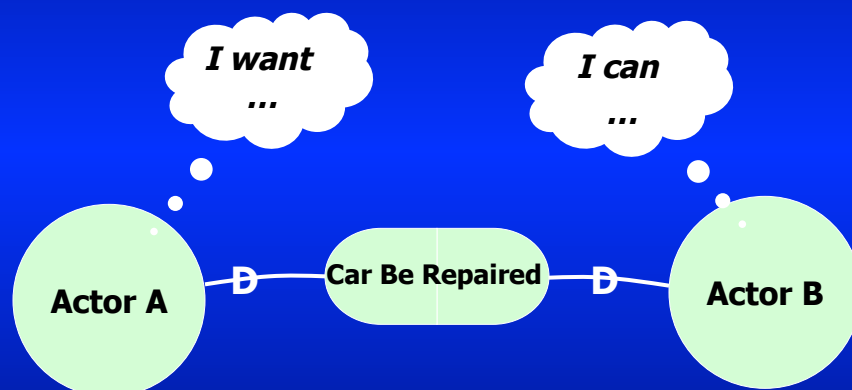
Fundamental questions for each strategic actor

- What do I want?
- How can I achieve what I want?
- Who do I depend on to achieve what I want?

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Strategic Dependency Relationship



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Modelling Strategic Actor Relationships and Rationales

- the i^* modelling framework

Strategic Actors

- have goals, beliefs, abilities, commitments
- are semi-autonomous
 - freedom of action, constrained by relationships with others
 - not fully knowable or controllable
 - has knowledge to guide action, but only partially explicit
- depend on each other
 - for goals to be achieved, tasks to be performed, resources to be furnished

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Two levels of strategic actors modeling

- **Strategic Dependency (SD) model:**
To analyze relationships among actors with strategic intent
 - includes humans and machines



SD model

- **Strategic Rationale (SR) model:**
To decompose the intentionality of each actor
 - Means-ends analysis



SR model

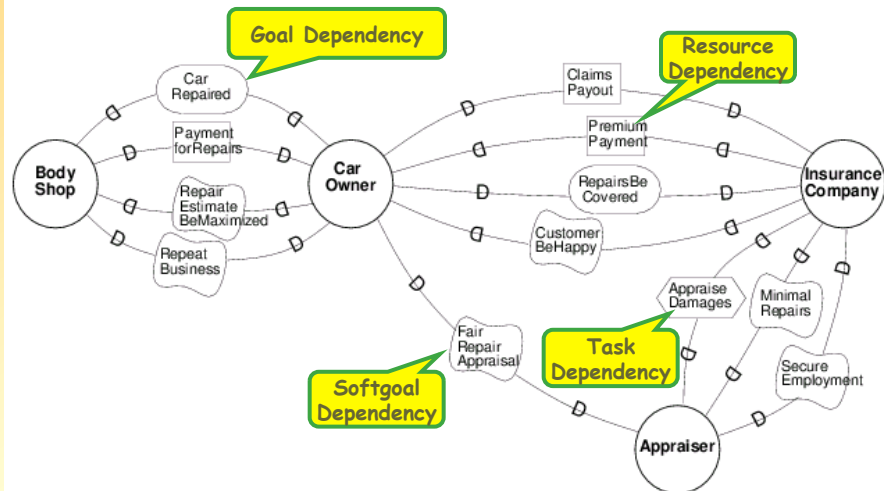
- What i^* does not aim to do
 - Execution level analysis
 - Temporal dimension

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The Strategic Dependency Model

automobile insurance – example 1

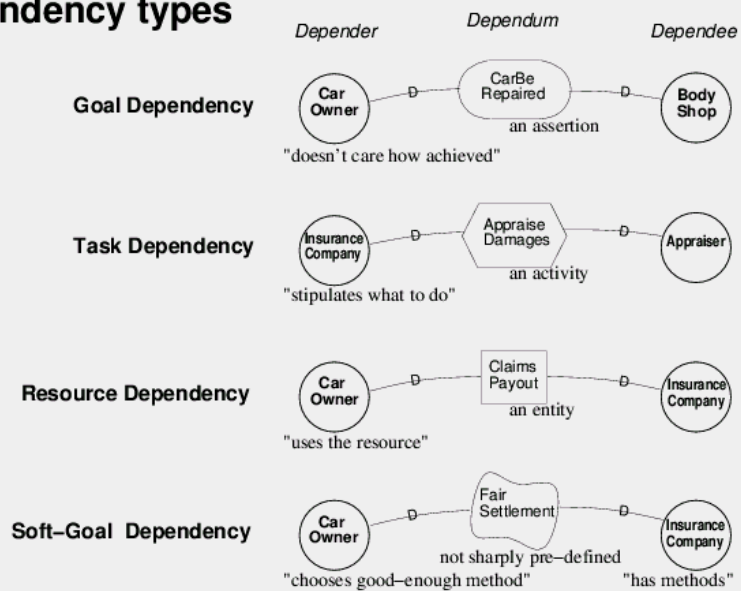


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Strategic Dependency Model

dependency types

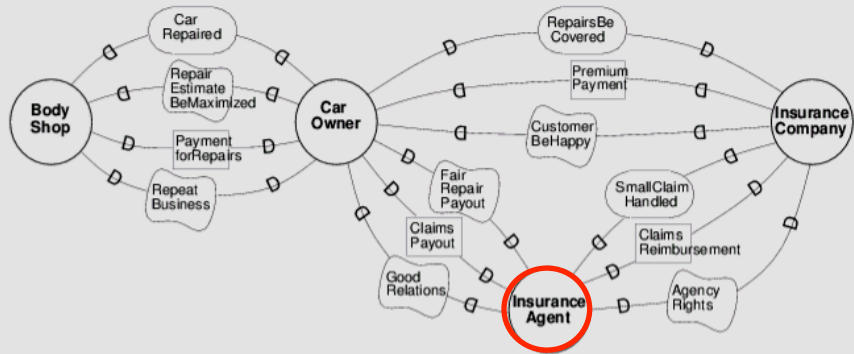


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The Strategic Dependency Model

auto insurance – example 2
“Let the Insurance Agent handle it.”



examples taken from: Hammer & Champy 1993 –
 Reengineering the Corporation, pp. 137–143.

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The Strategic Dependency Model

auto insurance – example 3
“Let the Body Shop handle it.”



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The Strategic Rationale Model

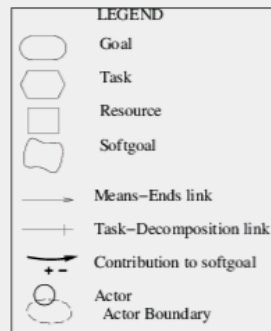
means-ends links and
task decomposition links

What does the task consist of?

Task
Decomposition
Link

What are the
means for
achieving the
desired end?

Means-Ends
Link



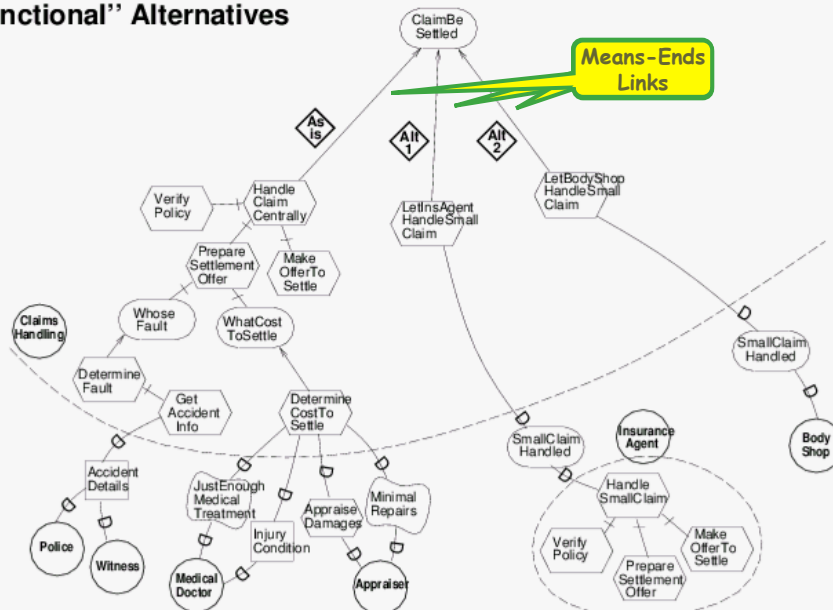
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The Strategic Rationale Model

“Functional” Alternatives

Means-Ends
Links



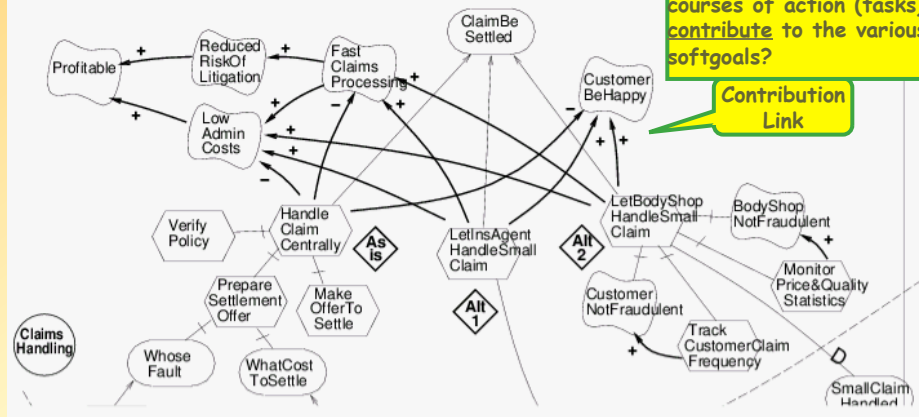
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The Strategic Rationale Model

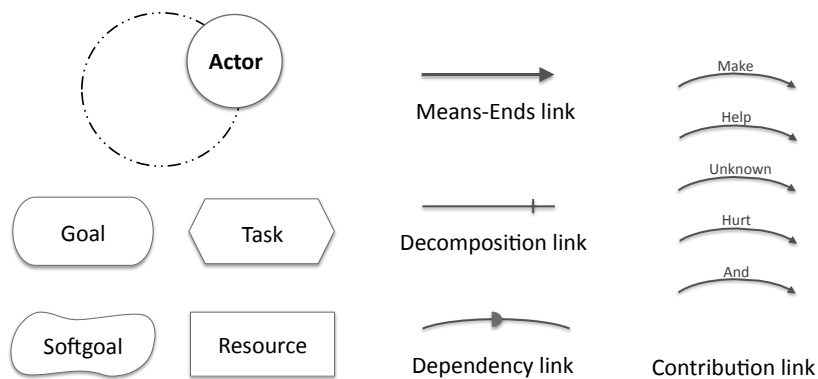
“Non-Functional” Rationales



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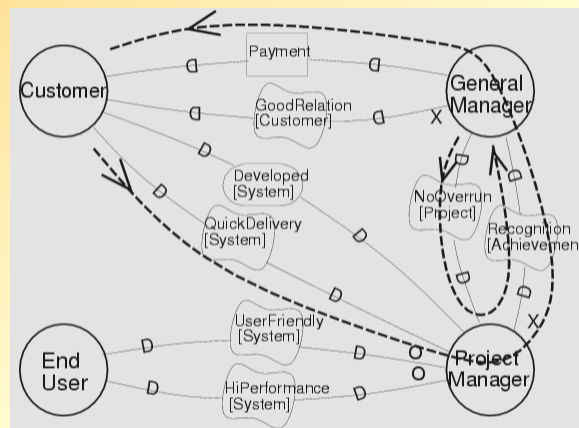
i* main concepts



26

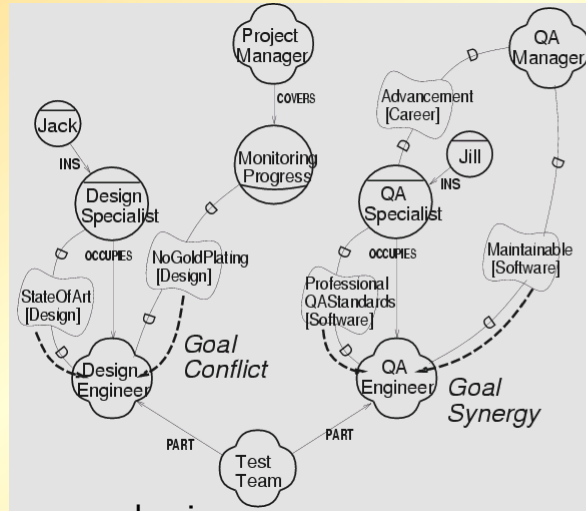
Analyzing the models

Analyzing vulnerabilities



- Example of enforcement mechanism
 - Reciprocal dependency
- Loop analysis

Analyzing vulnerabilities



- Example of assurance mechanism
 - Goal synergy or conflict
- Node analysis

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Are Actors' Strategic Goals Met?

[Yu Deng IWSECO'11
Understanding Software Ecosystems
Using Strategic Modeling]



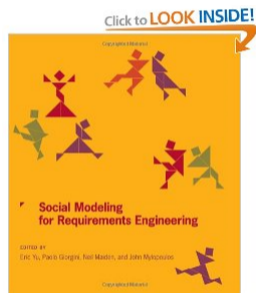


Open Research Issues

- Tools & Environments
 - Visualization
 - Scalability
- Empirical Studies
- Process & Methods
- Concepts
 - Time dimension
 - Ontology
- Education
- Standards
- Integration & Interoperability

i*-related resources

- ITU-T recommendation Z.151 (2008, 2012)
User Requirements Notation (URN)
 - Goal Requirements Language (GRL)
 - <http://www.itu.int/rec/T-REC-Z.151/en>



MIT Press 2011. 742pp.

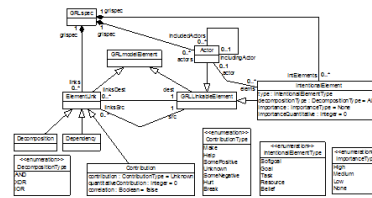


Figure 3/Z.151 GRL specification concepts

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Web sites

- ***i** Wiki** - Fostering Investigation, Collaboration, and Evaluation
 - <http://istarwiki.org>
 - Publication listings
 - PhD theses
 - Overview and Comparison of *i** Tools
 - The *i** Quick Guide
 - *i** Usage Guidelines
 - Who's Who
 - Events
- i-star group library on CiteULike

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4.1.1.5 Do not include an Actor within another Actor

i* Usage Guidelines

This Guideline Wiki Page displays the guideline as per the i* Style of the University of Toronto. Use Comment tab above to read or write comments about this guideline. Scroll down to see variations of this guideline for other i* modeling styles.

4.1.1.5 Guideline (Beginner, Concept) Do not include an Actor within another Actor.

Discussion: Actors are active and autonomous entities that should be modeled separately. "Sub-system" in the illustration can be modeled as actors that have Dependency Links with the main system and/or other actors. They can also be modeled with Association Links such as "is-part-of" and "ISA", to the higher-level system.

Return to IStarGuide document

Tools

i* wiki istarwiki.org

Available i* Tools

See a table summary of the features exhibit by this tools in the section Comparing the i* Tools. See the published metamodels in the section i* Metamodels.

- **OpenOME**
 - As a standalone application and as a plug-in for other popular tools, such as Ec modeling and analysis tool.
- **OME**
 - A graph editor to support goal-oriented and/or agent-oriented modeling.
- **REDEPEND-REACT-BCN**
 - REDEPEND-REACT is a tool that supports i* modeling and the analysis of the res on the representation of the information system using the i* framework and prov for the modelled information system.
- **TAOM4E**
 - TAOM4E supports a model-driven, agent oriented software development and, in Architecture (MDA) recommendations.
- **GR-Tool**
 - Forward and backward reasoning is supported in Tropos by a Goal Reasoning goal models and run the algorithms and tools for forward and backward reason embedded in the GR-Tool.
- **T-Tool**

- **Canada (U Toronto)**
 - OME, OpenOME
- **Canada (U Ottawa)**
 - jUCMnav for URN
- **England & Spain**
 - REDEPEND- REACT
- **Italy**
 - TAOM4E , GR Tool, T Tool , ST Toc
- **Spain**
 - GR-Tool , J-PRIM
- **Germany**
 - Snet Tool
- **Brazil**
 - Istar Tool, xGOOD, GOOSE
- **Belgium**
 - DesCARTES

22 listed on i* wiki
http://istarwiki.org/tiki-index.php?page=i*+Tools&structure=i*+Wiki+Home

i* variants & extensions

- Tropos – Mylopoulos, Giorgini, Perini, Castro, Kolp, ...
- GRL – Amyot, Yu, Liu, Mussbacher, Weiss, ...
- TCD – Gans, Lakemeyer, Kethers, Jarke, Schmitz, ...
- REF – Donzelli, Bresciani
- HUCRE – Gregoriadis, Shin, Sutcliffe,
- ERA – Sutcliffe
- RESCUE – Maiden, Jones, ...
- Nomos – Siena, Ingolfo, Perini, Susi, Mylopoulos...
- ...
- Secure Tropos UK – Mouratidis, Giorgini, ...
- Secure Tropos Italy – Giorgini, Massacci, Zannone, ...
- Secure i* – Elahi, Yu, Liu
- Si* – Zannone, Massacci, ...
- ...
- BASSiE – vdRaadt, Gordijn, Yu
- SBMO – Samavi, Yu ,...
- PRiM, RiSD – Grau, Franch,...
- CASL – Lesperance, Wang, Lapouchnian,
- ...
- Q-MOPP – Briand, Seaman, Basili,...
- KTA – Strohmaier, Horkoff, Yu ,...
- ...

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- ☐ [✓ Requirements-Driven Design and Configuration Management of Business Processes](#) [Quick Edit]
 In Business Process Management, Vol. 4714 (2007), pp. 246-261, doi:10.1007/978-3-540-75183-0_18
 by [Alexei Lapouchnian](#), [Yiun Yu](#), [John Mylopoulos](#)
 edited by [Gustavo Alonso](#), [Peter Dadam](#), [Michael Rosemann](#)
 posted to [goal-oriented](#) [non-functional](#) [personalization](#) [process-modeling](#) [requirements-engineering](#)
[variability annotation](#) [bpel configuration](#) by [alexel](#) to the group [i-star](#) keyed Lapouchnian2007RequirementsDri
 2013-07-15 16:42:38 ✓/ [along with 2 people](#)
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- ☐ [Towards supporting business services discovery through the integration of organizational model ontologies.](#)
 In Memorias de la XVI Conferencia Iberoamericana de Ingeniería de Software CibSE 2013 (8 April 2013), pp. 21:
 by [Blanca Vazquez](#), [Alicia Martínez](#), [Anna Perini](#), [Hugo Estrada](#), [Mirko Morandini](#)
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 Vazquez2013Towards on 2013-07-09 19:55:43 ★★★★★/
 ■ Abstract ■ Copy

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- ☐ [Extension and integration of i* models with ontologies](#)
 In Proceedings of the 6th International i* Workshop 2013, Vol. 978, No. 2. (17 June 2013), pp. 7-12

Group: i-star 114 tags

All tags in this group's library

_adaptive-systems²⁰ _agent-oriented⁶ _agent-oriented-system-development²⁴ _air-traffic⁴
 _aourn¹³ _aspect-oriented¹⁹ _bim⁶ _business-intelligence¹³ _business-modeling²³
 _comparison²¹ _compliance¹⁵ _data-warehousing⁶ _e-services⁵ _e3value³ _elicitation¹¹
 _empirical-case-study²⁴ _enterprise-architecture³ _environmental² _evolution¹¹ _experiment¹ _formal-specification¹
 _goal-model-reasoning¹⁰ _goal-oriented¹⁰ _grl¹⁸ _healthcare²⁶ _i-star⁹
 _indicators¹⁷ _industry-led⁴ _industry-partnered²⁵ _intellectual-property-management² _istar²⁴⁰
 _istar-discussed⁶ _istar-mentioned²³ _istarforwds³ _jucmnav¹⁸ _kaos² _knowledge-management¹³
 _language³⁰ _metamodel²⁸ _method-engineering¹¹ _metrics⁴ _model-checking⁴ _modeling²⁸
 _multi-agent⁴ _nfr¹¹ _non-functional¹³ _ontology¹⁶ _organization-architecture⁵ _patterns¹²
 _personalization⁵ _privacy² _process-modeling²⁷ _process-reengineering⁷ _project-management¹ _quantitative⁵
 _requirements²⁸ _requirements-engineering¹²⁹ _reuse¹ _safety¹ _scenario-oriented⁸
 _sd-model¹⁷ _security¹⁵ _service-oriented⁵ _simulation² _socio-tech-system-design¹⁰
 _software-process-improvement⁵ _software-process-modeling¹¹ _software-product-lines⁵ _sr-model²⁵
 _system-architecture¹⁷ _system-development-methodology²⁵ _thesis-masters² _thesis-phd⁵ _tool¹
 _trade-off¹⁰ _tropos³⁶ _trust¹⁵ _uml¹⁵ _uncertainty¹ _urn⁴⁵ _usage-methodology²² _use-cases³
 validation³ variability¹⁰ _visualization¹ web-engineering⁹ web-modeling-methods⁹ _cots¹ acme¹ conceptual¹ context-aware

References

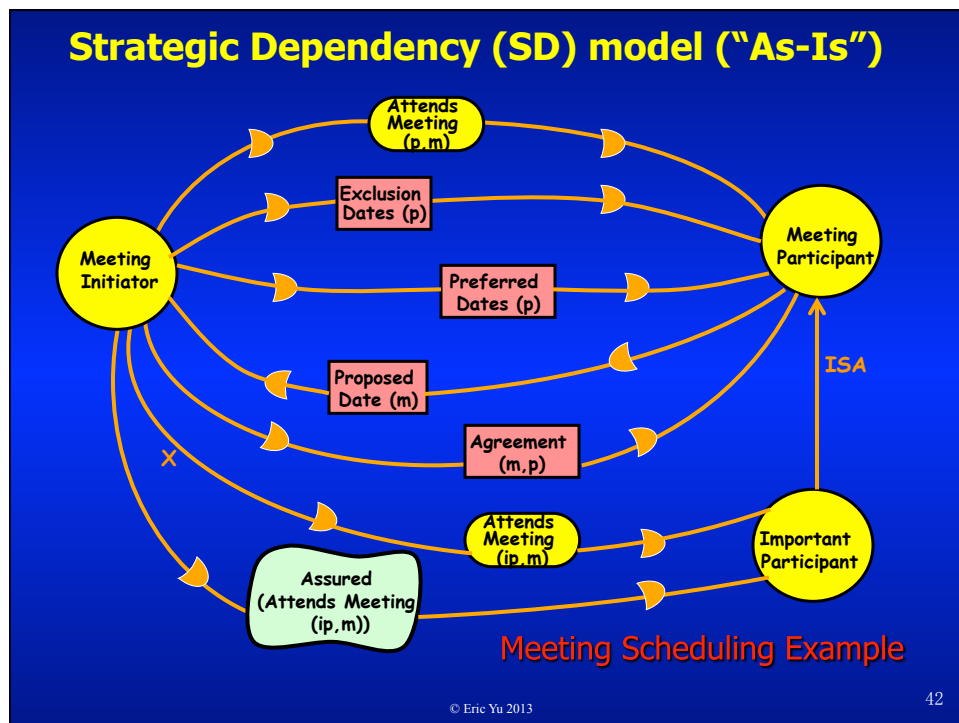
- Yu, E. **Social Modeling and i***. In: Conceptual Modeling: Foundations and Applications, LNCS 5600, Springer, 2009.
- Yu, E., Giorgini, P., Maiden, N., Mylopoulos, J. (eds) **Social Modeling for Requirements Engineering**. MIT Press, Jan 2011.
- **i* homepage** <http://www.cs.toronto.edu/km/istar/>
- **i* wiki** <http://istarwiki.org>
- **iStar showcase'11** <http://tinyurl.com/istarshowcase11>
- ITU-T Z.151 User Requirements Notation.
<http://www.itu.int/rec/T-REC-Z.151/en>
- **CiteULike** <http://www.citeulike.org/group/14571>

Exercise

- Consider a small problem domain, with:
 - a few actors/stakeholders
 - potential software application
 - Eg: visitor accommodation: hotel -> AirBnB?
- Ask:
 - Who are the actors?
 - What do they want?
 - How do they achieve what they want?
 - Dependencies on other actors?
 - Goals not achieved?
 - What alternatives to explore?
 - What consequences for various stakeholders?

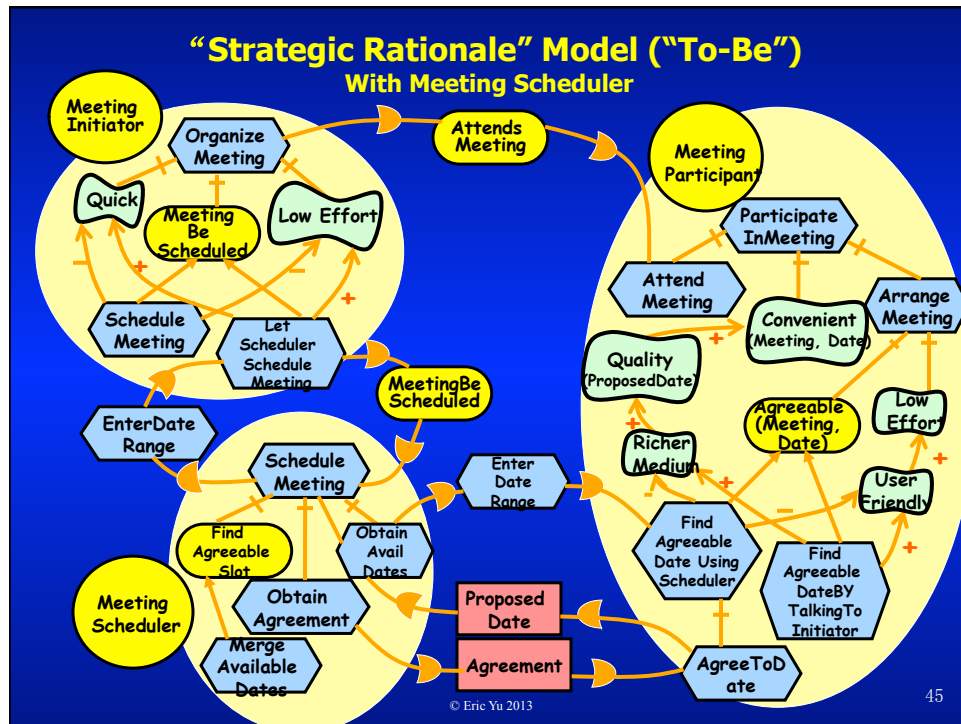
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1) Using i* with Scrum

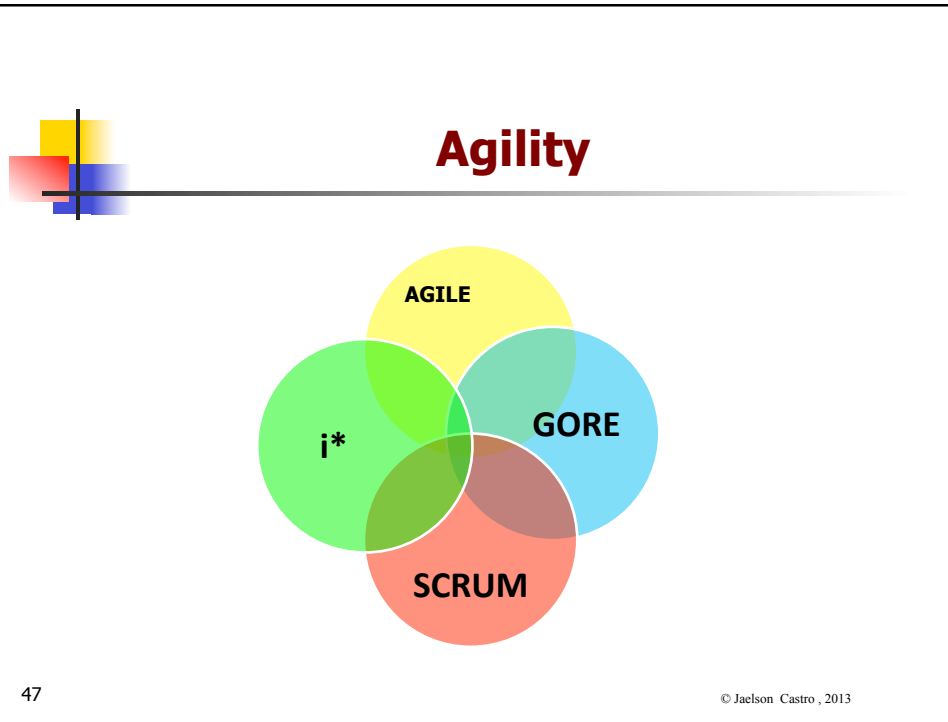
2) Using i* in Software Product Lines



Jaelson Castro

U.F. Pernambuco, Brazil

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Problem

- Failure of Software Projects
- Lack of Agility
- Organizational Requirements

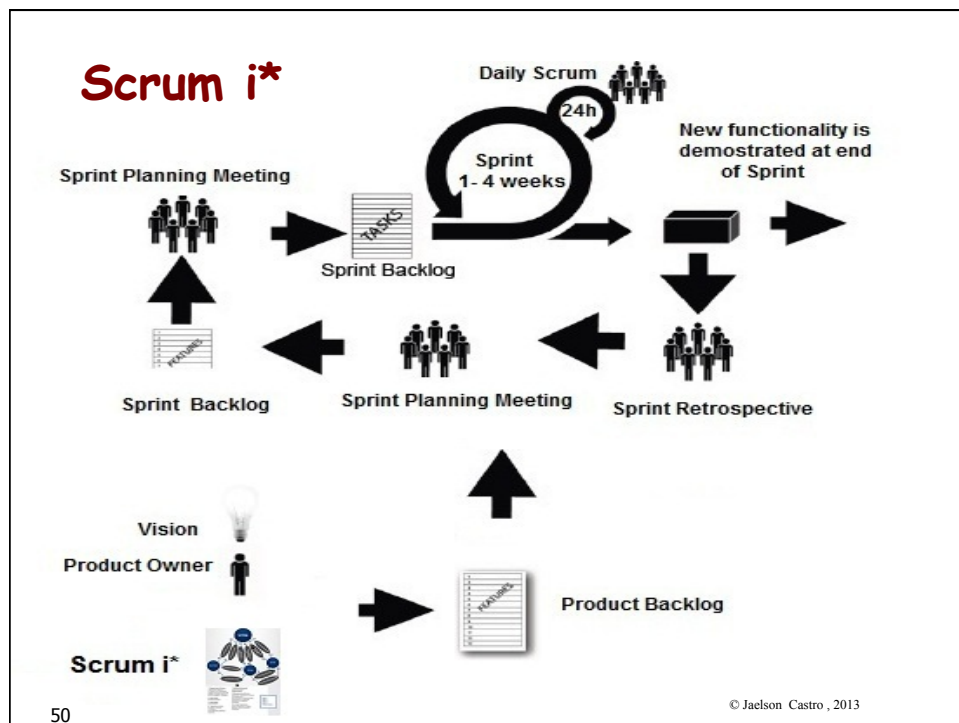
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Objectives

- Explore the use of i* models as a means to enrich / complement User Stories
 - Relating requirements presented as User Stories to i* models
- A graphical and comprehensive view of User Stories and their relationships by means of i* Models

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Case Study



Agile @ Brazil



Government Sector

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Scrum i*



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Evaluation



"Reduces the learning curve of the system in case of staff turnover"



78%: easily applicable

"In my perception, the Scrum i* artifact can be applied to any software development project using agile methodologies agile or not, since its purpose is to assist the understanding of the context of the application being developed, as is the mapping of actors and dependencies between them. It Then, it could another tool to be used in the requirements capture."

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Lessons Learnt



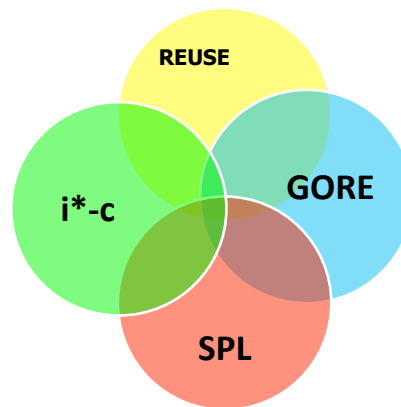
- Not all i* constructs are used
- Provides a better view (broader and general)
- Depicts dependencies between the stories and the system,
 - contributes to a better understanding of the context of the system under development
- Allows the recognition of possible errors or omissions in the user stories

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Software Product Line



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Problem



- Need for Reuse
- Relationship between
 - Features of a software
 - Stakeholders/goals

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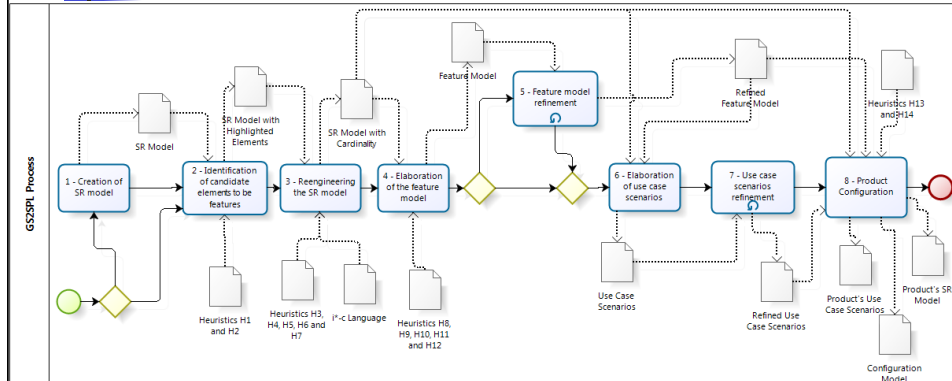
Objective

- To provide an approach *that integrates*:
 - *goal models,*
 - *feature models*
 - *use case scenarios*

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GS2SPL: Goals and Scenarios to Software Product Lines



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Case Study



Mobile Phones

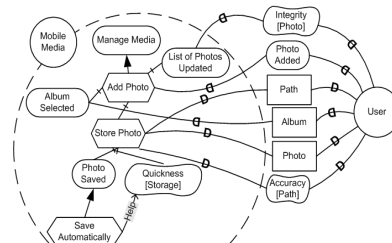
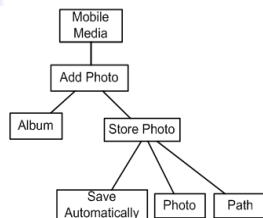


Testing Tools

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Artifacts



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Use Case 1: Add Photo

CHARACTERISTIC INFORMATION

Primary Actor: User
 Feature: Add Photo
 Scope: MobileMedia
 Pre-condition: -
 Success Condition: Photo added to album

PRIMARY SCENARIO

ID	User Action	System Response
1	Select "Add Photo" option [Add Photo]	Present list of available albums
2	Select album [Album]	Ask User to enter the path to the photo to be added
3	Provide path of photo [Path]	Present list of photos available on the provided path
4	Select photo to be added [Photo]	Exhibit selected photo miniature.
5	-	Photo is automatically saved [Save Automatically]
6	-	List of photos is updated

SECONDARY SCENARIOS

ID	User Action	System Response
3	Provided path is invalid [Path]	Inform that path is not accessible and ask User to provided a new path
5	There is not enough space to save photo [Save Automatically]	Inform that photo could not be saved due to lack of space

RELATED INFORMATION

Non-functional requirements: Integrity [Photo], Accuracy [Path], Quickness [Storage]

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Lessons Learnt

- Most relevant features and use cases to the stakeholders' goals are obtained in a systematic way
- configuration process allows the clients to configure their products on a higher abstraction level
 - select goals instead of features;
- configuration process also takes softgoals (NFRs) into account, according to the priority given by the client;

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Lessons Learnt

- Need for tool support
- Not clear how feature model constraints are derived from i* models;
- Need to take feature interactions into account when generating use case scenarios

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- 
- 1) Using i^* to architect hybrid systems
 - 2) Managing risk in OSS ecosystems
-



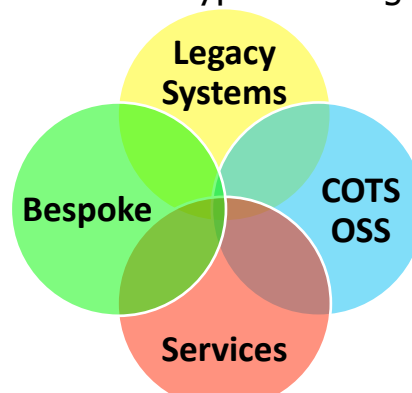
Xavier Franch
UPC – Spain

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Using i^* for architecting hybrid systems

Software system built by combining components of diverse type and origins



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Two case studies



Etapatelecom



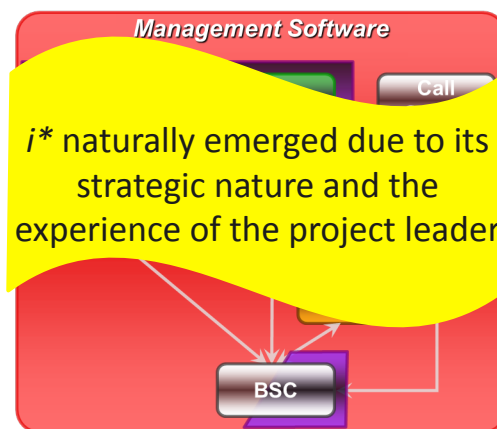
Aeropuerto de Cuenca

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Two case studies

- Similar characteristics and problems faced



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The DHARMA method



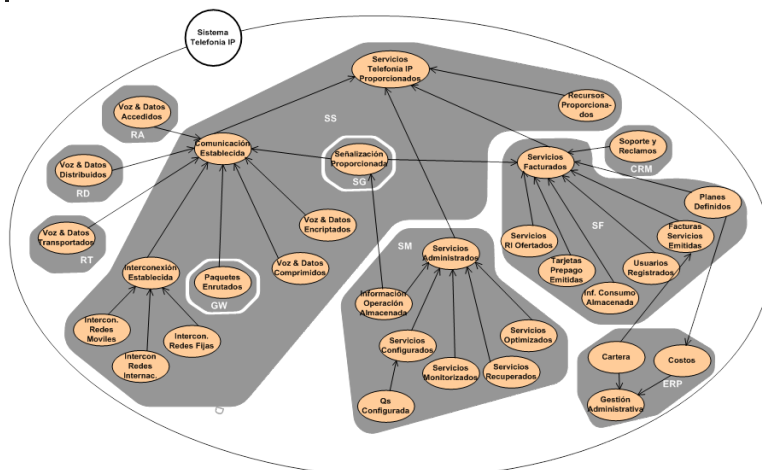
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Types of models built (I)



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Types of models built (II)



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Lessons learned

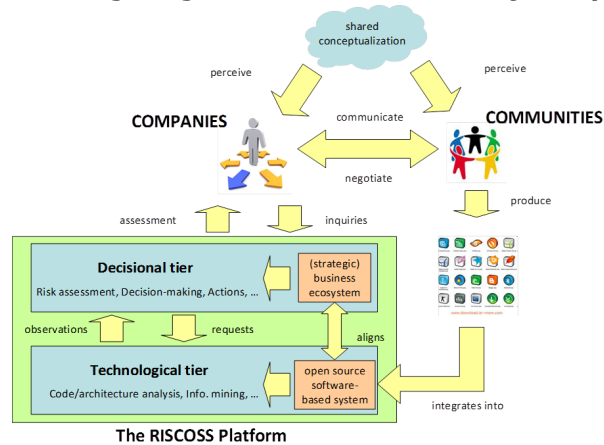
- Non-technical stakeholders may be involved
 - financial, administrative, commercial, legal
 - training required (tutorial + brainstorming)
 - use well-known tools (MS Visio)
- Team and individual work
 - joint elicitation of most relevant dependencies
 - individual models built by stakeholders
 - expert-conducted revision/validation
 - consolidation of models in a workshop
- "Reduced" i^* , e.g.
 - just goal-decomposition in SRs
 - no i^* types of actors -> but they defined theirs!

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Risk management in OSS ecosystems

- RISCOSS: ongoing EU FP7 STREP Project (Call 8)



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Industry application setting

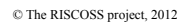
- Versatile use cases with risks related to OSS



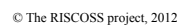
72

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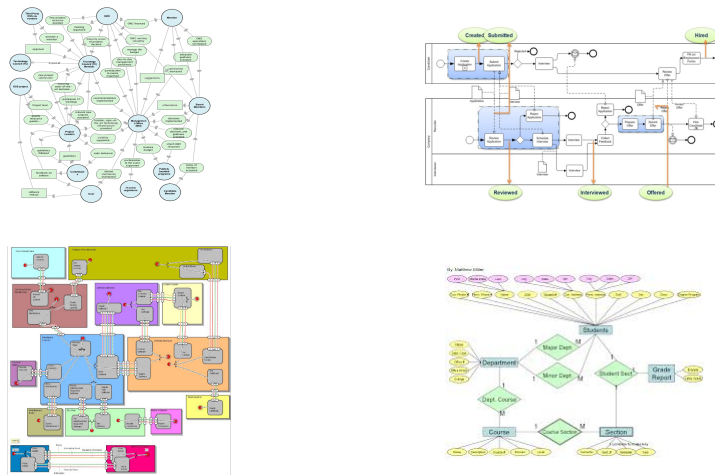
- help managing the diversity of involved stakeholders
- built upon a shared ontology



- characterise the ecosystem
- especially the relationship with communities
- basic for risk



Part of a multi-model solution



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Risk identification and mitigation (I)

- Define risks over ecosystem patterns

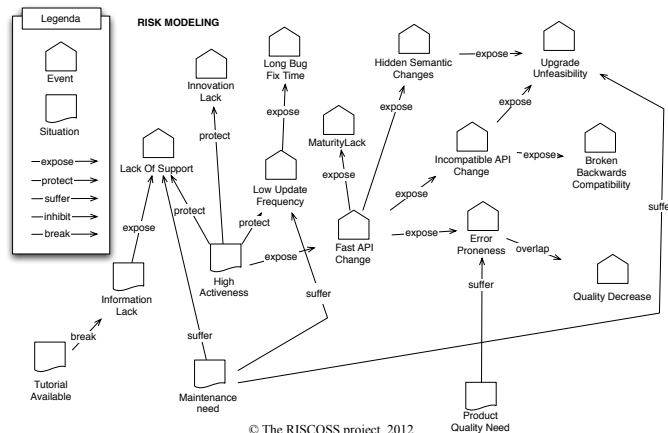


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Risk identification and mitigation (II)

- Risk models to be paired with i^* models



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Lessons learned: too early, but...

- Building the models have conducted to a lot of reflection in the consortium
- It has helped too to look for similarities and differences
- Stakeholders were able to intuitively validate our models
 - Although the precise semantics was difficult to understand!

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