#### **Carnegie Mellon University**

From the SelectedWorks of Cécile Péraire

Fall December 6, 2013

#### A Step Forward in Software Engineering Education: Introducing the SEMAT Essence Framework

Cécile Péraire, Carnegie Mellon University



Available at: https://works.bepress.com/cecile\_peraire/2/

#### A Step Forward in Software Engineering Education: Introducing the SEMAT Essence Framework

#### Dr. Cécile Péraire

**Carnegie Mellon University - Silicon Valley Campus** 

Evidence-Based Software Engineering Group

With the Participation of Dr. Carlos Zapata Universidad Nacional de Colombia





### Who am I?

- Assistant Professor at CMU SV
- Co-Lead SEMAT Education Area
- Areas of Interest
  - Agile, Lean & Disciplined Software Development
  - Requirements Engineering, Empirical Studies

Previous Life:

- Ph.D. in C.S. (Software Testing) from EPFL
- Postdoc at SRI & HP
- Various experiences at Rational & IBM
  - Consultant, Project/Program Manager, Methodologist
  - Contributed to RUP and IBM's internal methods



Rational

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# Agenda

- Challenges in SE Education
- What is SEMAT? What is Essence?
- How does the Essence Kernel Work?
- World Tour of SEMAT Educational Activities
  - Carnegie Mellon University
  - Universidad Nacional de Colombia
- SEMAT Vision for Education

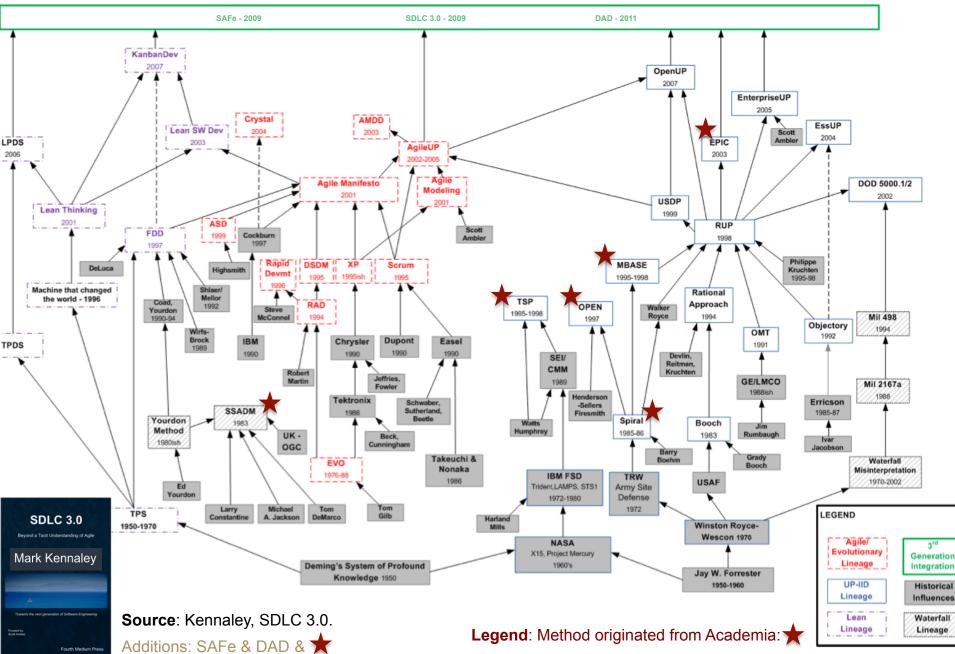


### Fact or Fiction?

The Industry is driving software engineering innovation with Academia lagging behind.



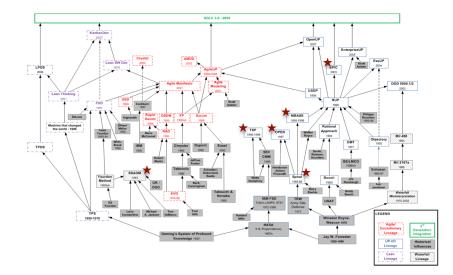
#### **Evolution of Software Methods**



### **Evolution of Software Methods**

Out of the 40 methods which made it to the chart a minority (about 15%) originated from Academia or was significantly influenced by Academia.

Among this minority, none are from Agile or Lean lineage.

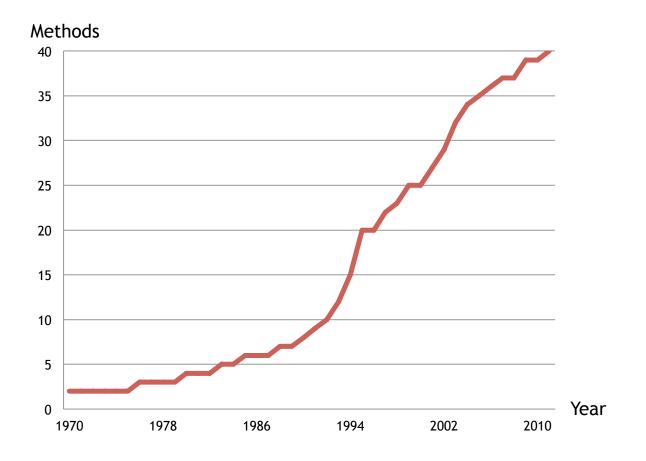




### **Evolution of Software Methods**

#### 32 methods emerged in the last 20 years

#### $\rightarrow$ 1.6 new methods per year

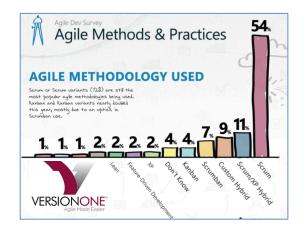


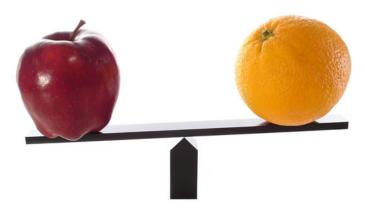
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## Challenges in SE Education

#### Select Method(s) to Teach

- Based on what criteria?
  - Adoption rate
  - Effectiveness
  - Coverage
  - Etc.
- Compare Methods





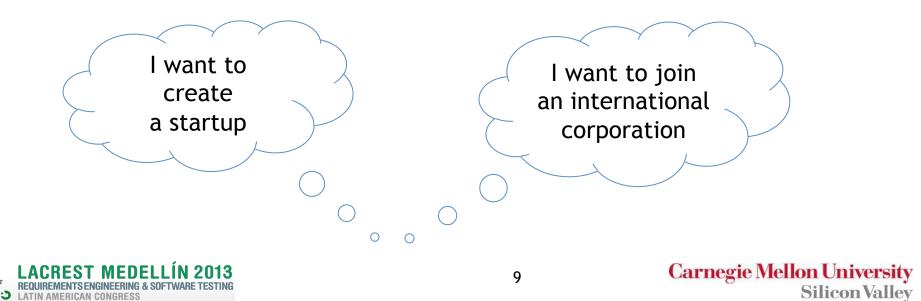


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### Challenges in SE Education



Address Various Needs of Students

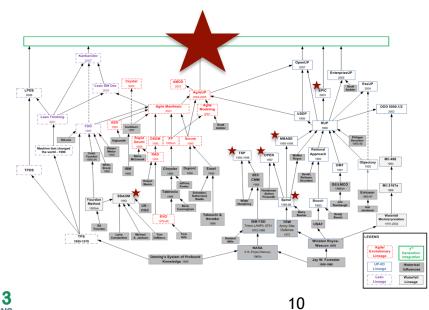


## Challenges in SE Education

• Keep courses cutting edge with minimum waste/rework



 Conduct research adding value to our courses and to the industry



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### Stop teaching methods; Start teaching practices!

#### Methods are composed out of a buffet of generally accepted practices

"Teams are puzzling out the mix of methodologies and combining them to fit within their organizational realities, blending Agile and non-Agile techniques and practices to create a hybrid methodology"

D. West, T. Grant, 2010 FORRESTER®



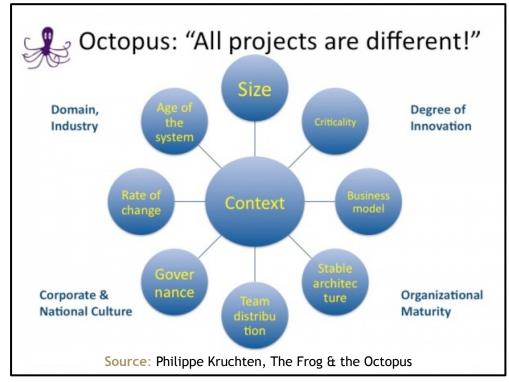




#### Teach practices in context

#### Practices are only "GOOD" in context





Other authors advocating about context: B. Boehm, A. Cockburn & S. Ambler

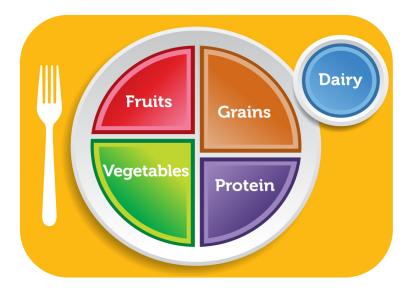


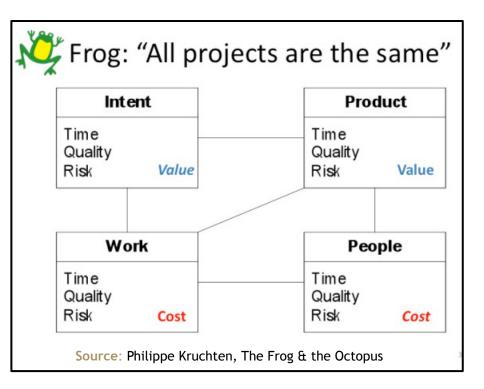
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#### Teach the essence of methods

#### Anchor SE courses in common grounds







- Conduct research around:
  - The essence of methods / software engineering
  - Practices (definition & validation in context)





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## What is SEMAT?

**SEMAT:** Software Engineering Method and Theory



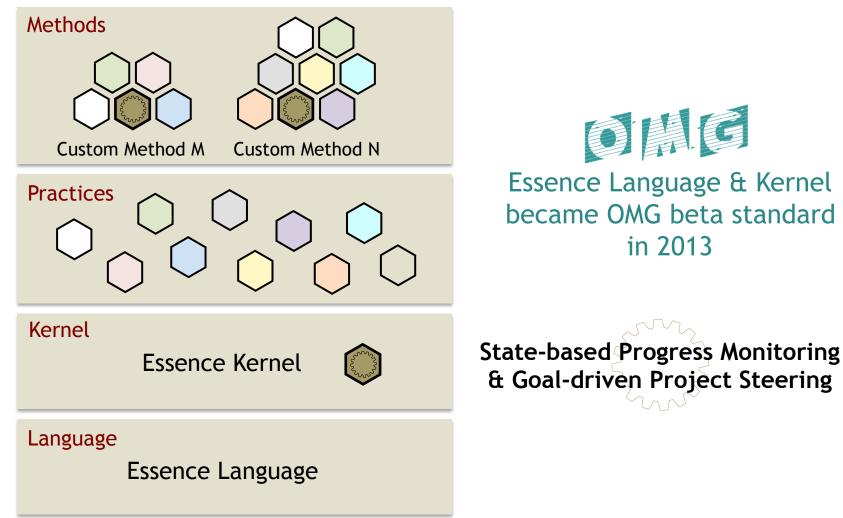
Founders: Ivar Jacobson, Bertrand Meyer, Richard Soley

Vision: Re-found software engineering as a rigorous discipline based on a general theory of software engineering and a unifying process framework



### What is Essence?

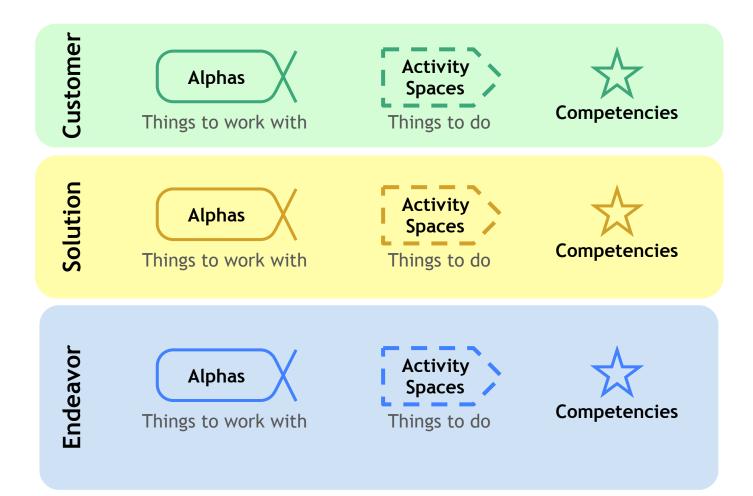
#### **Essence Method Architecture**





### **Essence Kernel**



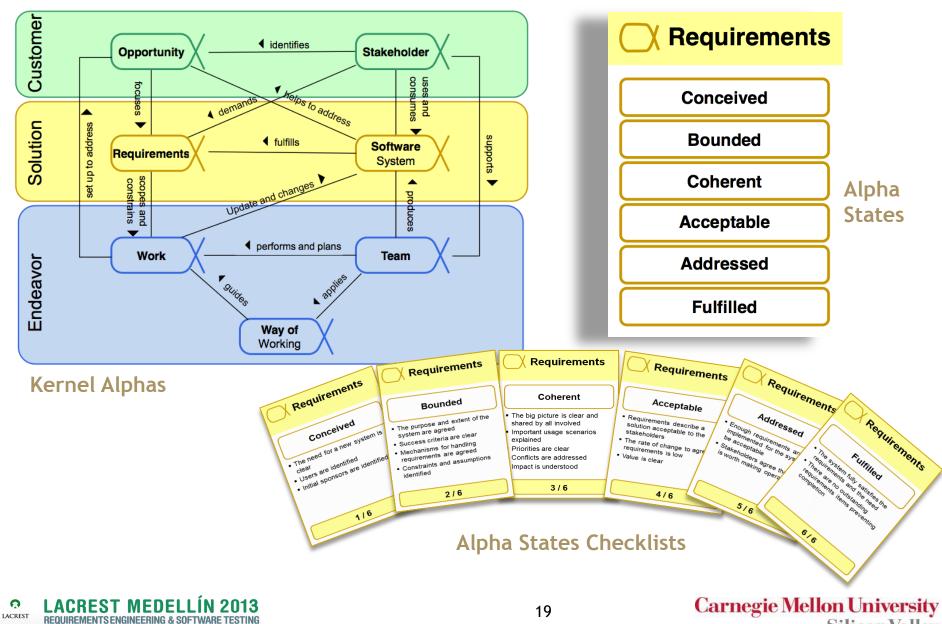




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### **Essence Kernel Alphas**





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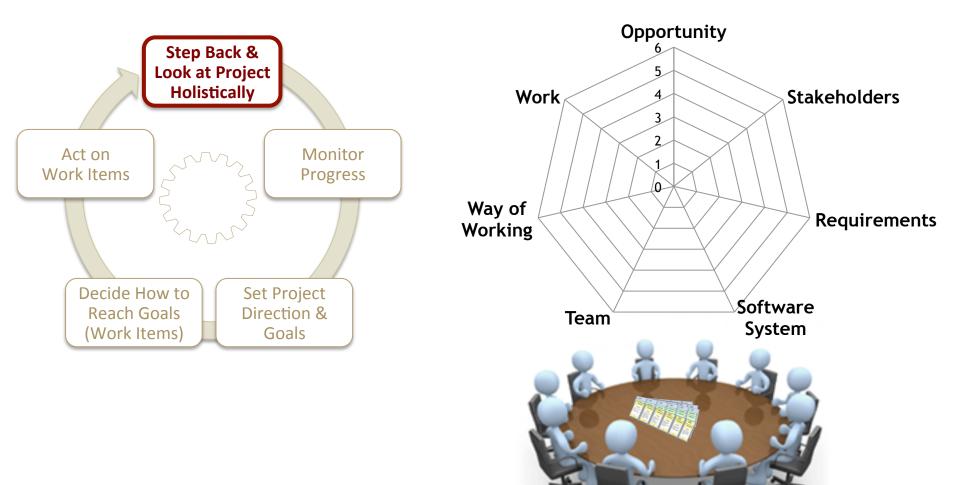
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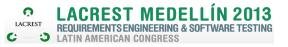
Silicon Valley

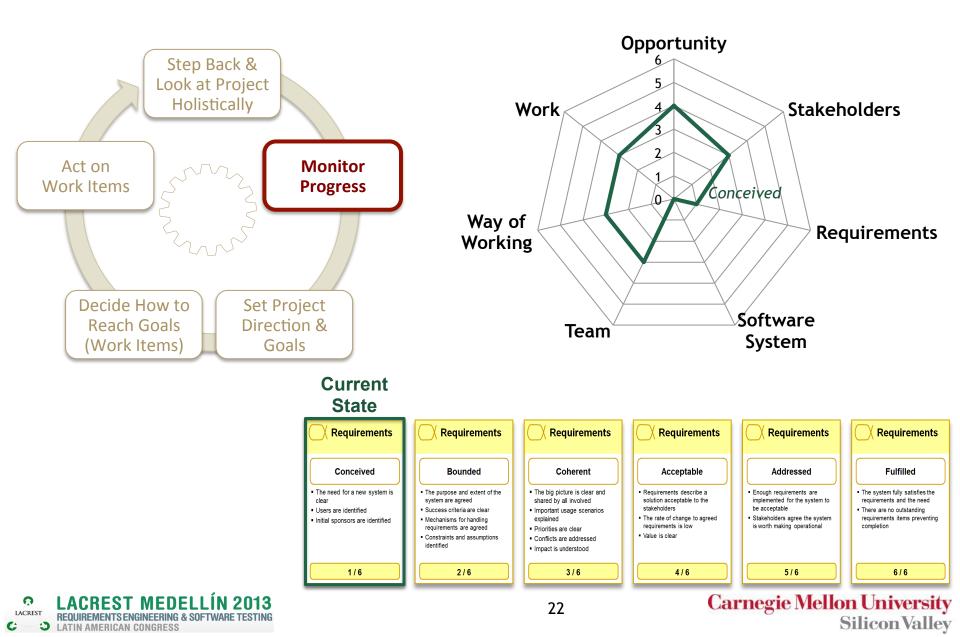
# Agenda

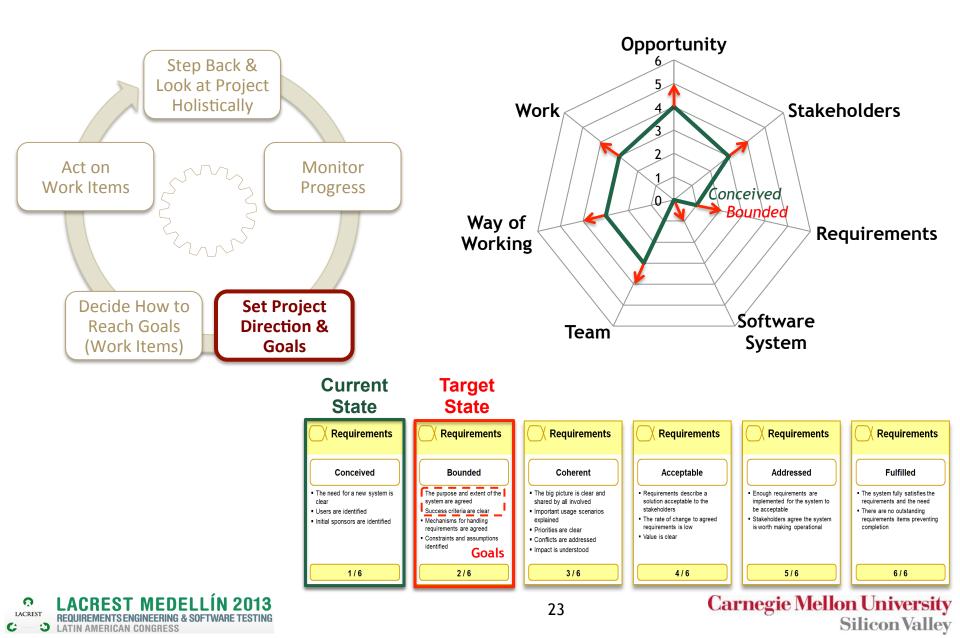
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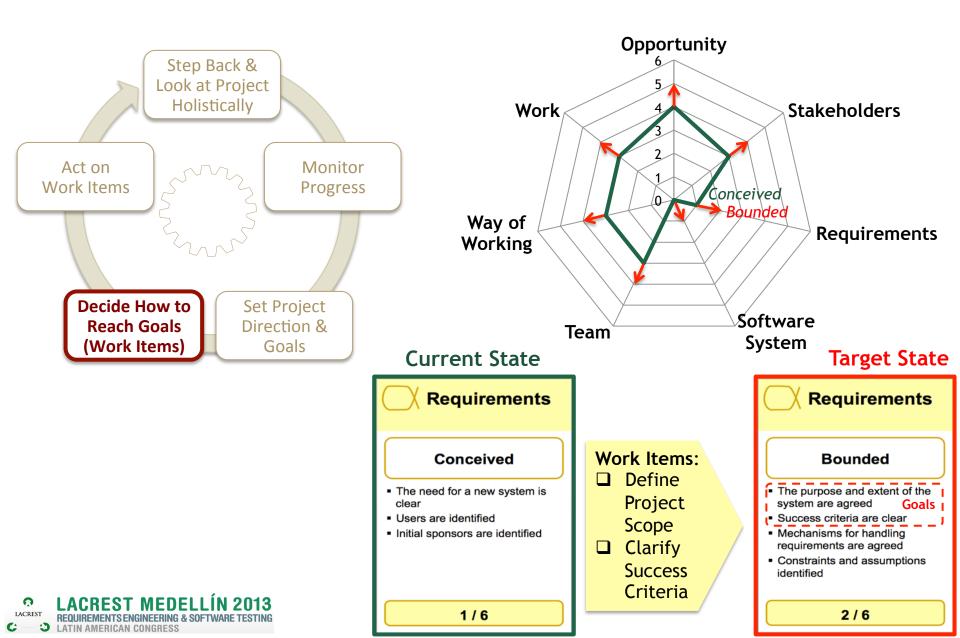


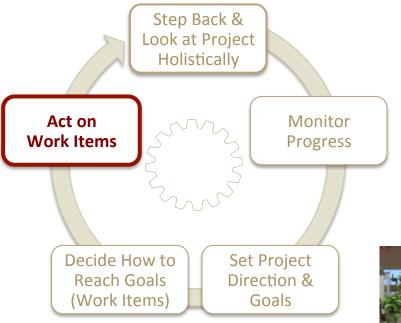










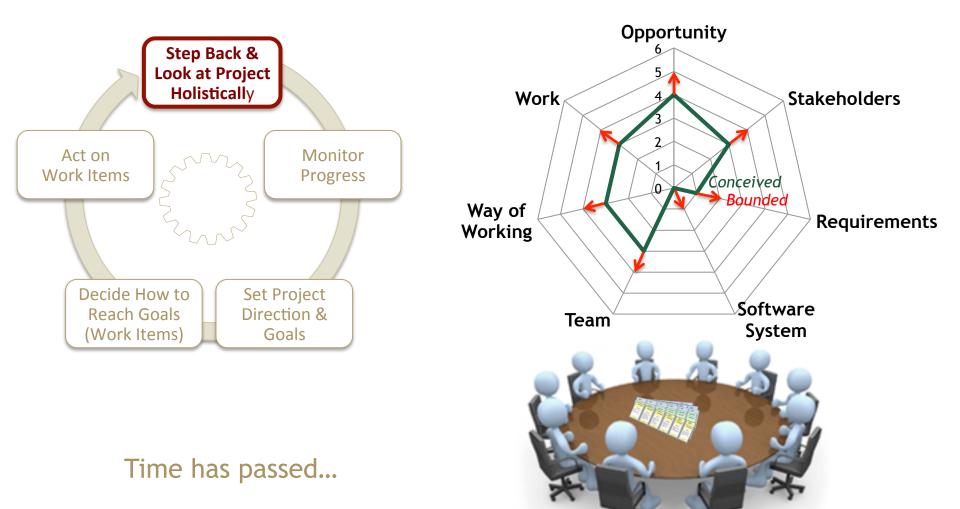


# Work Items Define Project Scope

- Clarify Success Criteria
- ...
- ...
- ⊔ ...
- □ ...









# Agenda

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  - Carnegie Mellon University
  - Universidad Nacional de Colombia
- The SEMAT Vision for Education



# World Tour of SEMAT Educational Activities



Universities and institutes members of the SEMAT Education Area and leveraging Essence in software engineering education (2013)





Cécile Péraire



Todd Sedano



**Research Goal: Evaluate the effectiveness** of Essence's monitoring and steering approach **provided by the kernel alphas and their states** in the context of practicum graduate courses

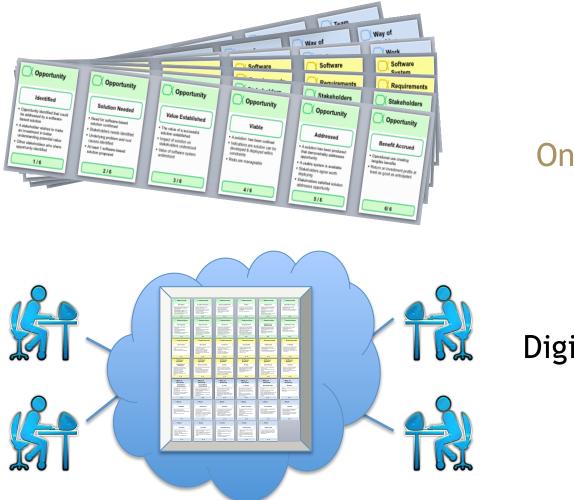


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Team Name	Industry Project Medium to high technical complexity	Team Size	Average Work Experience			
15 week project - Each student works 20 hours per week						
Distributed-1	Audio streams rendering for accessibility 3 10 year		10 years			
Distributed-2	Access/preservation of electronic journals 4 6 year		6 years			
Distributed-3	Survivable social network 4 8		8 years			
12 week project - Each student works 20 hours per week						
Co-located-1	Electric vehicle fleet management 2		3 years			
Co-located-2	Sonification of financial trading 4 3 year		3 years			
Co-located-3	Mobile performance testing	3 4 years				
Co-located-4	Virtual sensors definition & management 5 5 years		5 years			

Teams are self-organizing - No constraints on development method - Iterative lifecycle





#### Physical Strips (versus Cards) One Strip per Alpha

#### **Digital Essence Board**



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Date:	Iteration:	Week:	
Alpha	Current State	Target State	Work Item / Notes
Stakeholders			
Opportunity			
Requirements			
Soft. System			
Team			
Way of Working			
Work			

Essence Log Updated weekly (1/2 hour session)

- What did you like the most about Essence?
- What did you like the least about Essence?
- Was following Essence worth your time? (Please explain why or why not)
- Would you use Essence on your next project? (Please explain why or why not)

Final Survey

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#### **Research Questions**

Does the approach provide value to the project team?

How does it provide value to the project team?

When in the project lifecycle does it add value?

What are the limits of the approach?



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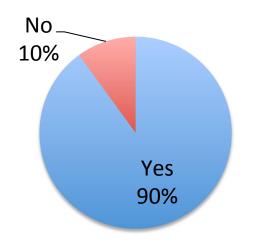


#### **Research Question:**

#### Does the approach provide value to the project team?

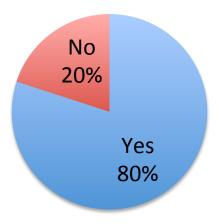
#### **Survey Question:**

Was following the Essence approach worth your time?



#### **Survey Question:**

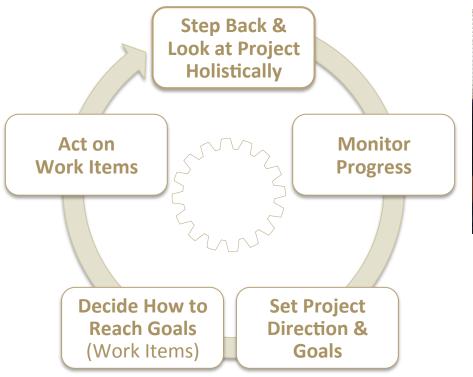
Would you use Essence on your next project?

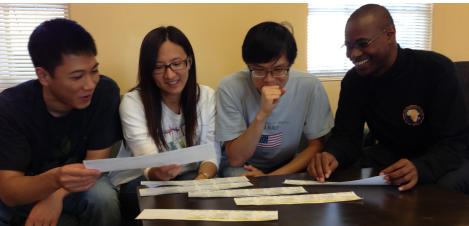




#### **Research Question:**

#### How does the approach provide value to the project team?





#### Value comes primarily from team discussions

Let's take a closer look...

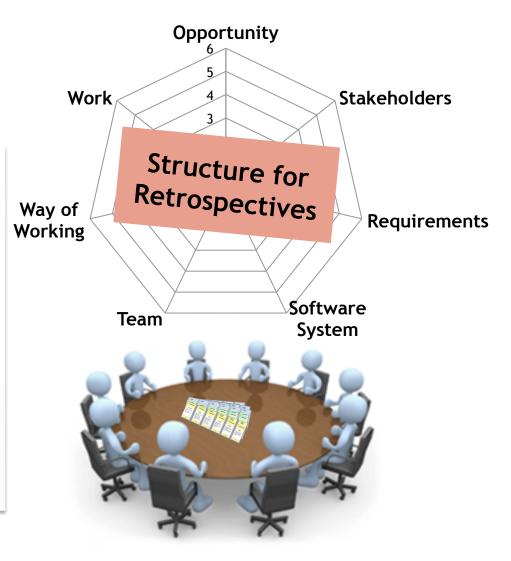


Step Back & Look at Project Holistically

#### **Quotes from CMU Students:**

"Essence gives us a chance to back up and look at the project as a whole, from the birds point of view."

"Essence provides a structured way of thinking about critical aspects of the project. Without Essence, our team could have overlooked some of these aspects."





Monitor Progress

**Quotes from CMU Students:** 

"The alphas seem to be exactly the right areas to monitor to promote project success."

"Essence is great for team reflection & risk management."

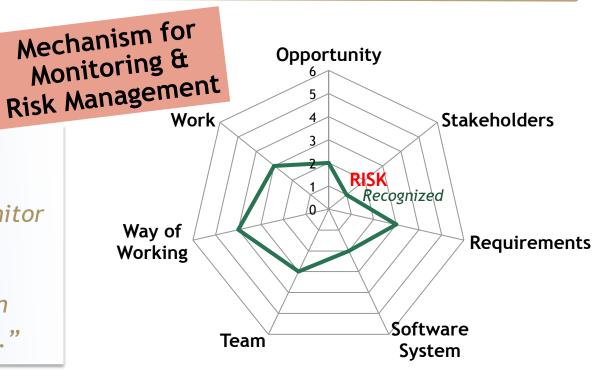
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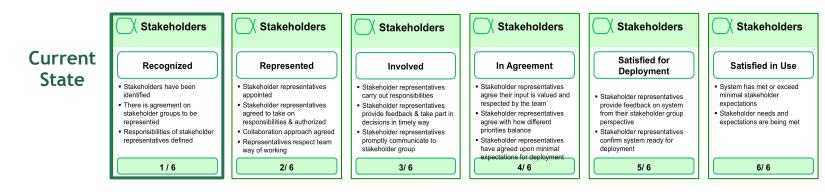
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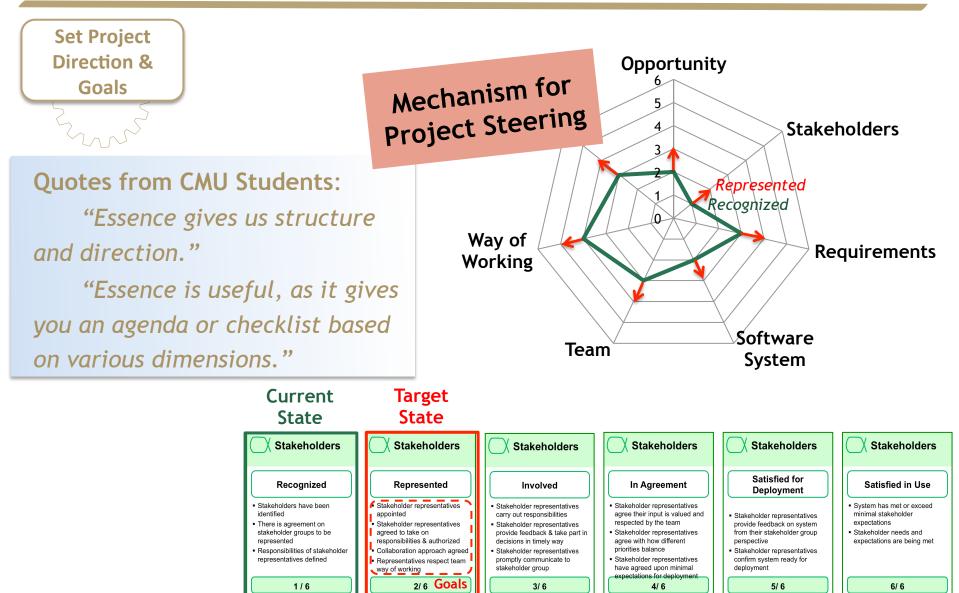
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**RISK:** Opportunity & Requirements defined without proper stakeholders involvement

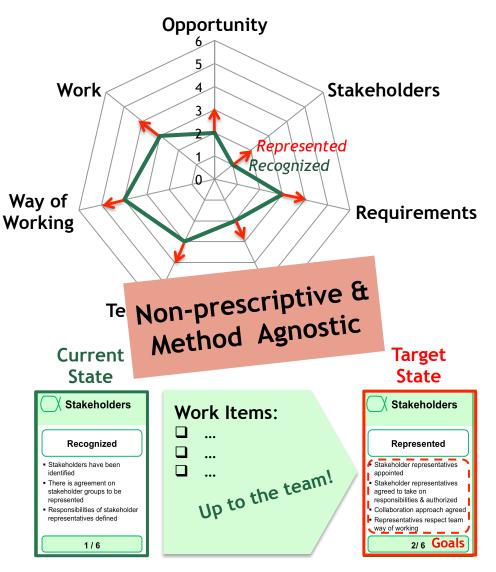




Decide How to Reach Goals (Work Items)

#### Quote from CMU Student:

"I will use Essence on my next project, especially with a team that is not used to the same software engineering process. In that case Essence is a backdrop at the basis of the communication about all the considerations for the success of the project."





**Research Question:** 

#### How does the approach provide value to the project team?

The Essence kernel provides a structure and mechanism for:

- Progress monitoring
- Retrospectives
- Risk management
- Project steering



#### In a holistic, simple, lightweight, non-prescriptive and method-agnostic fashion

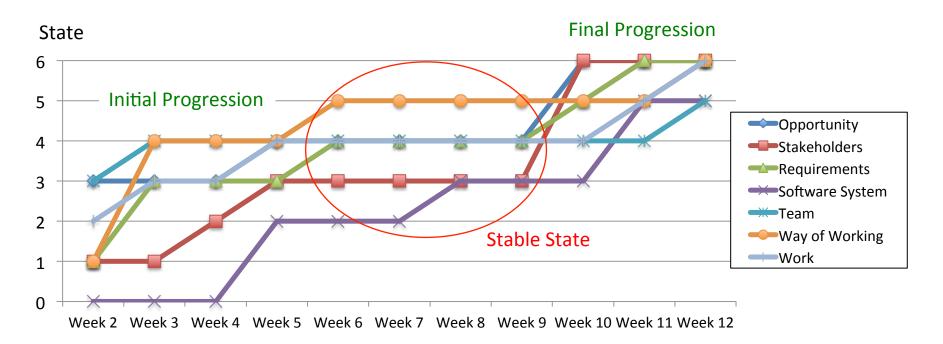


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#### **Research Question:**

#### When in the project lifecycle does the approach add value?

Alpha State Progression for Team Co-located-3

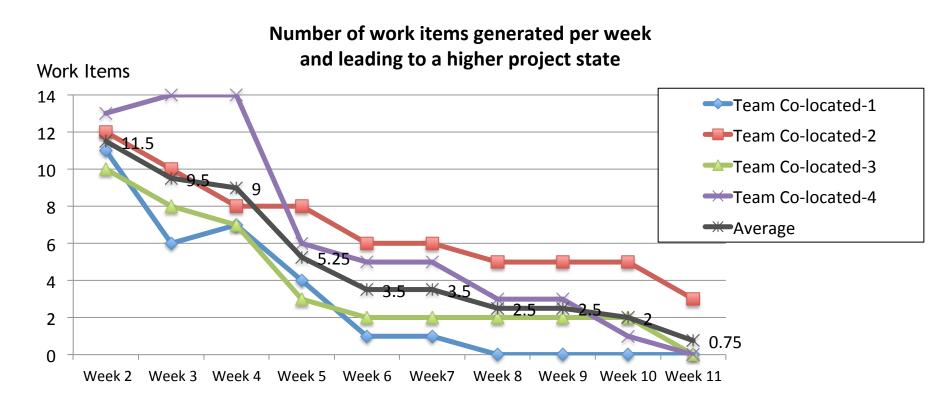


Initial state progression is driven by Essence-generated work items



#### **Research Question:**

#### When in the project lifecycle does the approach add value?



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**Research Question:** 

#### When in the project lifecycle does the approach add value?

#### Effectiveness is optimal during project initiation & decreases over time

#### Quote from CMU Student:

"Essence [Kernel] lost value once the project settled because we dead ended on a set of cards." Quote from Practicum Course Faculty: "Compared to previous years, I see a much better early project organization with lot less floundering. I hope that we keep using Essence in the future. We should definitely keep it at the beginning of the projects."



**Research Question:** 

#### When in the project lifecycle does the approach add value?

# Most teams continue to perceive value throughout the lifecycle out of the retrospectives

**Quote from CMU Student:** 

"Even though we are not generating new tasks, the SEMAT meetings remain useful as they give us the opportunity to reflect upon our project."



**Research Question:** What are the limits of the approach?

- By design, the Kernel is universal:
- Lifecycle-independent

 $\rightarrow$ Iterative development requires additional support

- Generally expressed at a project/release level
  - →Lower level work requires additional support (like technical work done during an iteration)

Hence the work done during construction on iterative projects requires additional support



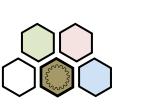
**Research Question:** What are the limits of the approach?

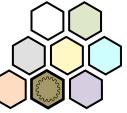
Essence's monitoring and steering approach provided by the kernel alphas and their states is optimum during project initiation and for monitoring and steering the work done at the project or release level. Beyond that, the approach's value decreases as the inherent limits of the universal kernel are reached.



How could we push the limits?

• Leverage practices on top of the Kernel





• Leverage other facets of the Kernel



- Extend or alter the Kernel definition
  - Is the Kernel truly universal?
  - Are there universal elements that are missing?



Essence Value: Team discussions based on holistic project view to achieve lightweight:

- Progress monitoring
- Retrospectives
- Risk management
- Project steering

Any Method E.g. Scrum & XP



2005, MOUNTAIN GOAT





**Carlos Zapata** 



- Main activities
  - Modifications to current courses
  - Proposal of a new course
  - Game design and playing
  - Tutorials in several events



#### • Current courses

- Software project management
- Requirements engineering
- Software application design and construction
- Modifications to existing courses
  - Representation of the UNC-Method in the SEMAT kernel
  - Control of Endeavour health and progress with alpha cards
  - Risk control with the SEMAT kernel



- Proposal of a new course:
  - Name: "Software Engineering Methods and Theory"
  - Syllabus
    - A. General Software Engineering Theory Introduction
    - A.1. Motivation
    - A.2. General problems about Software Engineering
    - A.3. Why we need a Software Engineering Theory?
    - B. Basic Elements of the Software Engineering Kernel
    - B.1. Alphas
    - B.2. Activity spaces
    - B.3. Methods and practices
    - B.4. Competencies
    - B.5. Work products

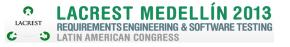


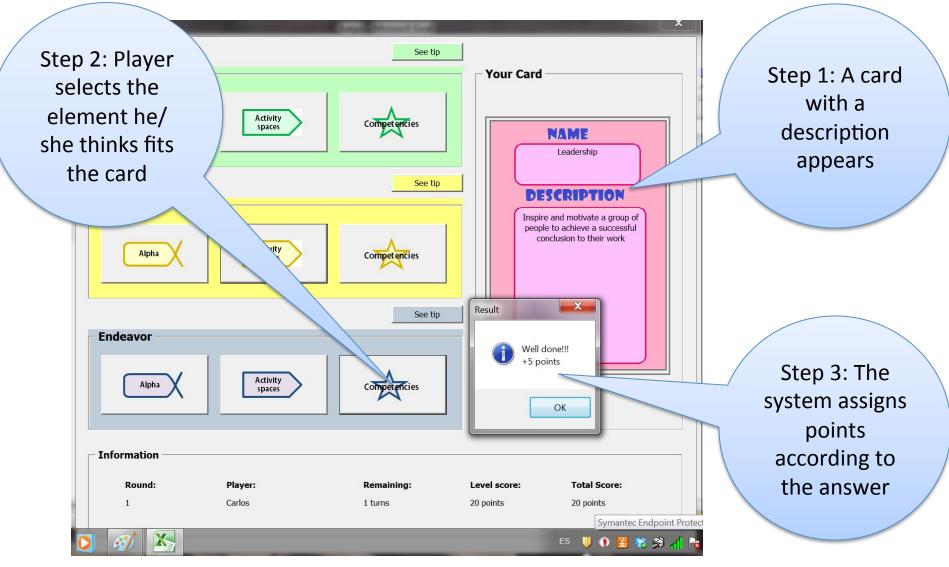
#### – Syllabus

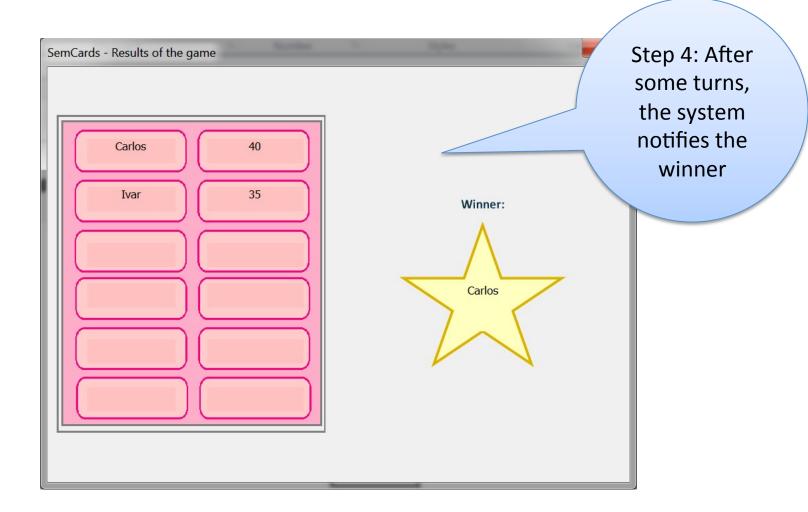
- C. Advanced elements of the Software Engineering kernel
- C.1. Patterns
- C.2. Resources
- C.3. Detail levels
- C.4. Competency levels
- C.5. Card representation
- C.6. Separation of concerns
- C.7. Kernel work tools
- D. Formal representation of the Software Engineering kernel
- D.1. Introduction
- D.2. Kernel metamodel
- D.3. Kernel textual specification
- D.4. Object diagrams and executable pre-conceptual schemas



- Game design and playing:
  - SemCards
  - MetricC
  - The software system alpha
  - The requirements alpha
  - Etc.









#### • MetricC

- The game is based on Hasbro<sup>™</sup>'s *Mille Bornes*
- It matches metrics and completion criteria with activity spaces
- Four kinds of cards: attack, defense, metric, and completion criteria
- The goal of the game is achieving three completion criteria by adding values to metrics

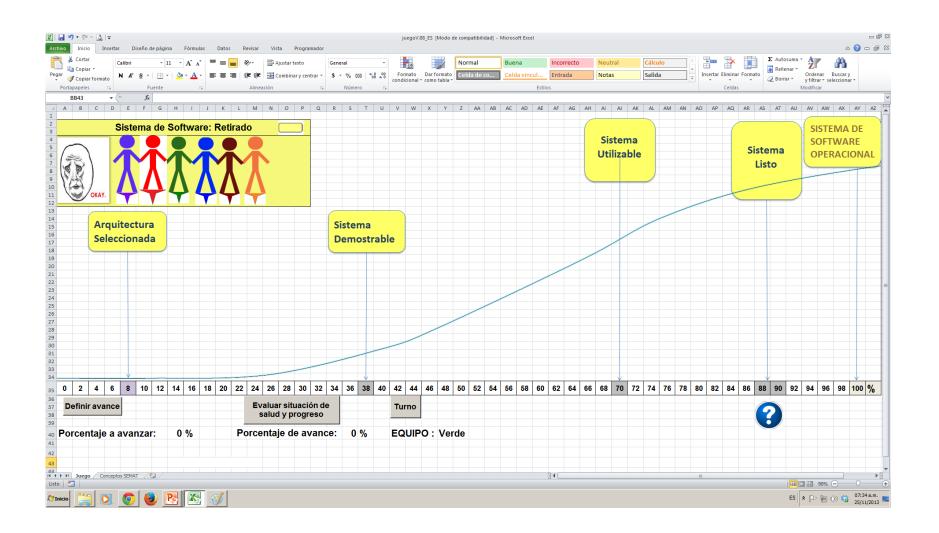




#### • The software system alpha

- Only available in Spanish
- Players are team members whom need to "travel" across the states of a software system
- Some situations arise for giving the possibility of advancing the states
- The situations are described in terms of the SEMAT kernel elements (alphas, activity spaces, competencies, etc.)
- The "retired" state is always a possibility of the game



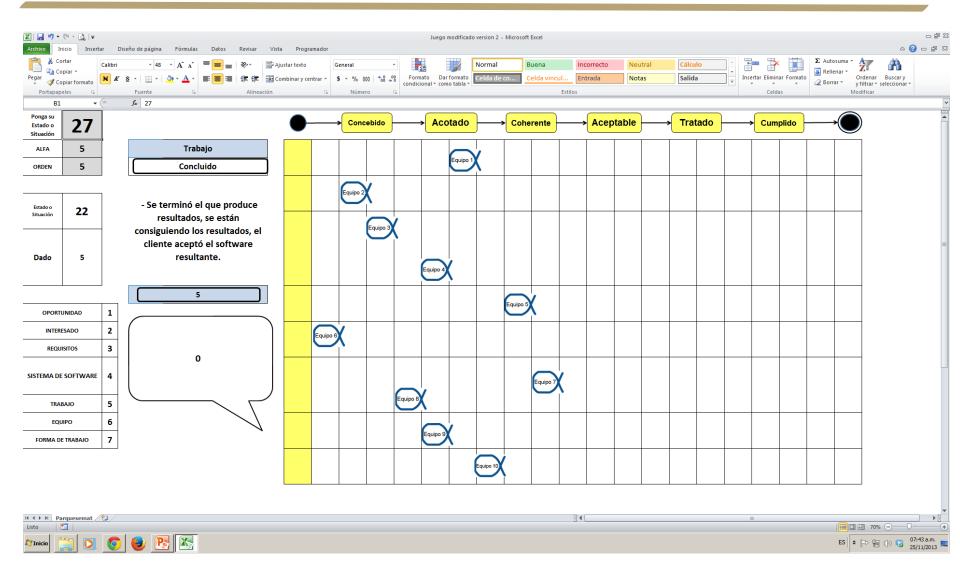


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#### • The requirements alpha

- Only available in Spanish
- Players are team members whom need to "travel" across the states of the requirements of a software system
- "Guessing" the states belonging to certain alpha is one of the options for advancing the states
- Some situations arise for giving the possibility of advancing the states
- The situations are described in terms of the SEMAT kernel elements (alphas, activity spaces, competencies, etc.)















#### Essence-Powered SE Education at UniBz



Pekka Abrahamsson



Daniel Graziotin



Xiaofeng Wang



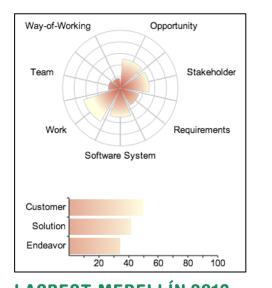
Freie Universität Bozen Libera Università di Bolzano Free University of Bozen - Bolzano

Italy

#### Open Source Web-based Tool

#### for SEMAT Kernel

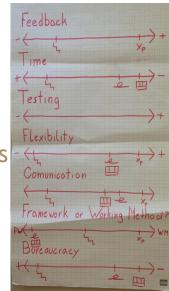
http://sematacc.meteor.com



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#### Course: Introduction to Management Engineering

Research question: How intrinsic are SEMAT Essence Kernel elements for inexperienced students?



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### **Essence-Powered SE Education at KTH**



Mira Kajko-Mattson

Using the Essence Kernel at KTH in the context of an IT-Project course (2012-2013)



Royal Institute of Technology Sweden





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## **Essence-Powered SE Education at JCSE**



Barry Myburgh

Educational Activities under auspices of The Jo'burg Centre for Software Engineering (JCSE) In the School of Electrical and Information Engineering At the University of the Witwatersrand



www.jcse.org.za



#### JCSE Courses & Workshops Leveraging Essence:

- ELEN 7044 Software Engineering Principles and Methods Audience: Masters Students and/or Continuous Professional Development
- ELEN 7012 Selected Topics in Software Engineering Audience: Masters Students and/or Continuous Professional Development
- Using SEMAT Essence for Project Health Check and Action Planning Wokshop Audience: Practitioners in Industry

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## **Essence-Powered Education at MIPT**

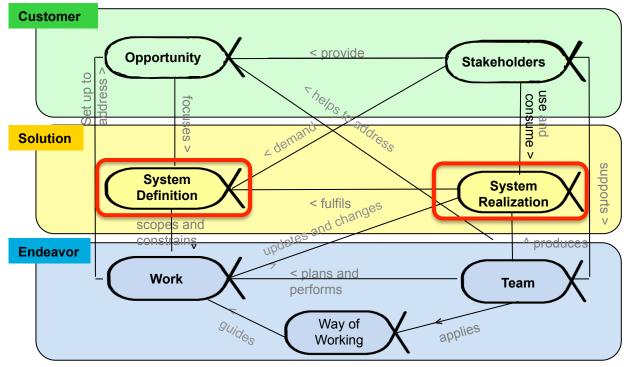


Anatoly Levenchuk





#### **Essence for Systems Engineering**



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#### MIPT Courses leveraging Essence:

- Foundation of Systems Engineering (2013)
- Systems Engineering Thinking in Lifecycle Management (2014)
- Practices of Model-based Systems Engineering (2014)



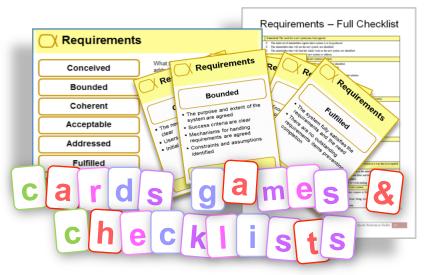
### **Essence Education Material from IJI**



Pan-Wei Ng



lan Spence



Progress Poker	Lifecycle Layout
Chase the State	Milestone Mapping
Objective Go	Health Monitoring
Checkpoint Construction	And more

http://www.ivarjacobson.com/alphastatecards/

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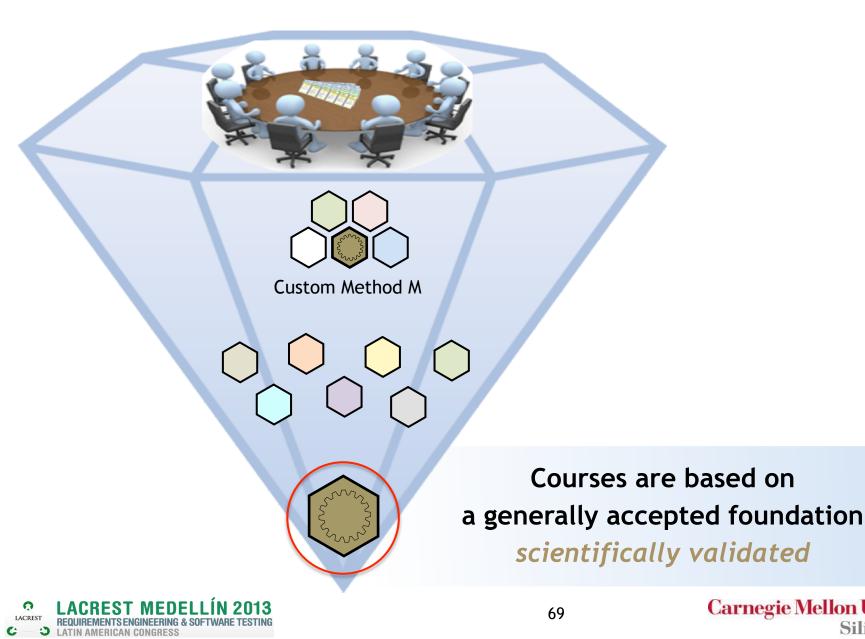


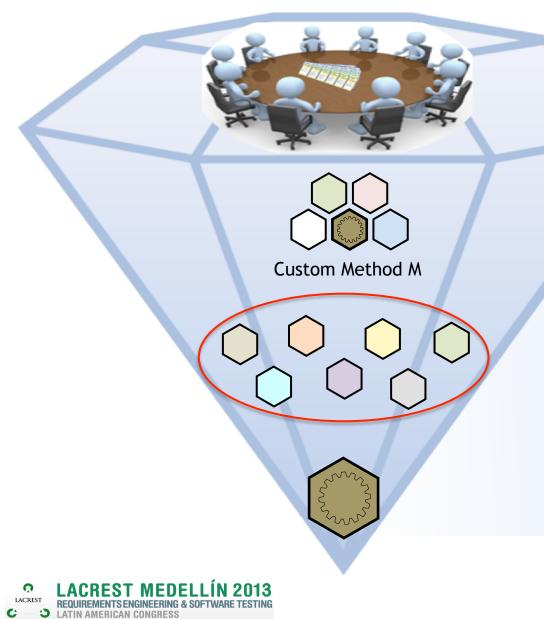


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Students learn about generally accepted practices including measures of effectiveness in context

Data help educators make informed decisions about what to teach

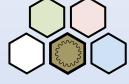
Modularity facilitates course evolution; Courses are kept cutting edge with minimum waste/rework



Students learn to compose methods out of (potentially tailored) practices based on project context







Custom Method M

Students are trained to become "generalizing specialists" enabling a smoother transition between:

#### University and Industry

- Projects
- Organizations
- Positions
- Domains



#### A Step Forward





#### References

- Ivar Jacobson and all. The Essence of Software Engineering: The SEMAT Kernel, acmqueue, 2012.
- Ivar Jacobson and all. The Essence of Software Engineering: Applying the SEMAT Kernel, Addison-Wesley, 2013.
- Cécile Péraire and Todd Sedano. State-based Monitoring and Goal-driven Project Steering: Field Study of the SEMAT Essence Framework, CMU-SV-13-1, 2013. <u>http://works.bepress.com/cecile\_peraire/1/</u>
- SEMAT Essence Kernel Tool, <u>http://essence.sv.cmu.edu</u>
- <u>Semat.org</u>







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