

Document and automate processes with Rational Method Composer and Jazz: **Part 4. Create new process assets**

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August 07, 2012

This series of articles about the importance of documenting methods focuses on integrating Rational Method Composer with Rational Team Concert, which is on Jazz technology. Part 1 explained the value of an integrated approach, and the subsequent articles use sample scenarios to describe how organizations use these integrated tools. Part 2 described how a team used a process included in Rational Method Composer, and Part 3 covered how they extended the process description to accommodate new process needs and then automated that process in Rational Team Concert. In this article, Part 4, Ricardo Balduino describes how the team starts with and then adapts existing practices from Rational Method Composer and creates a new process template in Rational Team Concert to get the team started and to run the project.

[View more content in this series](#)

Scenario: Create new process assets

In Parts 2 and 3 of this series of articles, you saw how the Business Recovery Matters™ (BRM) team at the JKE organization quickly configured their project environment and got started in hours, not days. The team used proven patterns of success to create plans and work items. Each work item provided links to relevant guidance, so team members were able to quickly get up to speed on the team's process. This article describes how the JKE team creates new process assets.

JKE is rapidly expanding into new business areas and recruiting people to fill positions. The company needs more robust HR software to manage its resources. They decide that adopting a commercial off-the-shelf (COTS) software and adapting it to their needs will save time and be more cost-effective than developing new HR software in-house. However, the company has no previous experience with selecting, adapting, and deploying commercial software, so they need a process that guides them on how to do that.

The team responsible for developing the HR software borrows Peter from the BRM team because he has IBM® Rational® Method Composer expertise. They examine the process library included in

Rational Method Composer and find a set of practices to guide them through selecting, adapting, and deploying the COTS software. They decide to follow those practices to help them in this new project. They also decide to automate the process in IBM® Rational Team Concert™, so that the team can closely follow the process guidance.

The following team members are relevant to this scenario:

Peter, process engineer
Kelly, project manager

The sections that follow describe the team members' actions.

Customize the process in Rational Method Composer

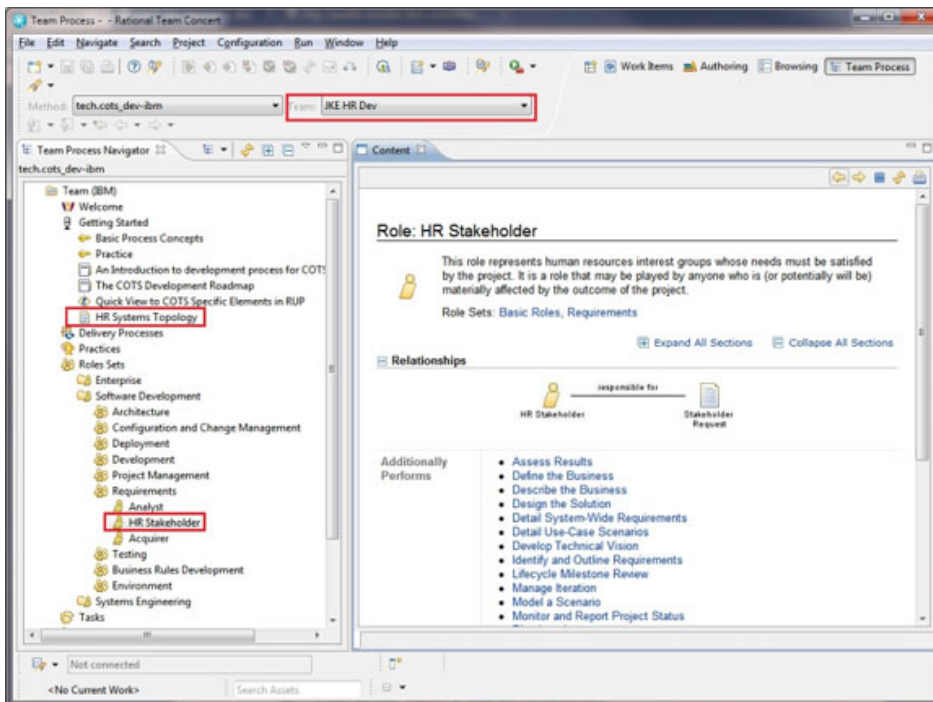
Peter has a Rational Method Composer license, and he confirms that there are content reader licenses for the entire HR development team.

Create a team process

1. Peter finds relevant guidance in the IBM Technote called [How to create a team process](#).
2. In the Rational Method Composer practices library, he opens the **Team Process** perspective, which supports making minor changes to a process.
3. Peter selects the COTS method configuration and creates a new team and names it JKE HR Dev. Changes are automatically placed in the JKE HR customization plug-in, rather than changing the original plug-ins provided in the library.
4. Peter performs the following tasks:
 - In the Team Process Navigator tab, under **Getting Started**, he adds a new Supporting Material named HR Systems Topology, so the document can be easily accessed.
 - He renames the Stakeholder role to HR Stakeholder, so the role name aligns with terminology used at JKE.

Figure 1 shows the resulting changes.

Figure 1. Making simple changes in the Team Process perspective



Publish the customized process

From the **Team Process** perspective, Peter publishes the COTS configuration as a web archive file named `cots.war`, following the guidance in the Rational Software information center topic, [Publishing configurations as web sites](#). When the publishing ends, Peter goes to the output folder and copies the `cots.war` file to this JTS folder:

```
Jazz_server_install_folder\server\tomcat\webapps\rmc
```

The published process content is now available for team members to access.

Create a new process template

Peter is now ready to create a process template in Rational Team Concert, so he finds guidance on the IBM Technote titled [How to generate a Jazz Process Template](#).

1. In Rational Method Composer's Team Process perspective, Peter clicks the Create and Deploy Jazz Process Template icon and uses the process template creation wizard (see Figure 2).
2. In the **Select team process** view, for Context root, he enters the location where the published content was deployed to in the previous steps.

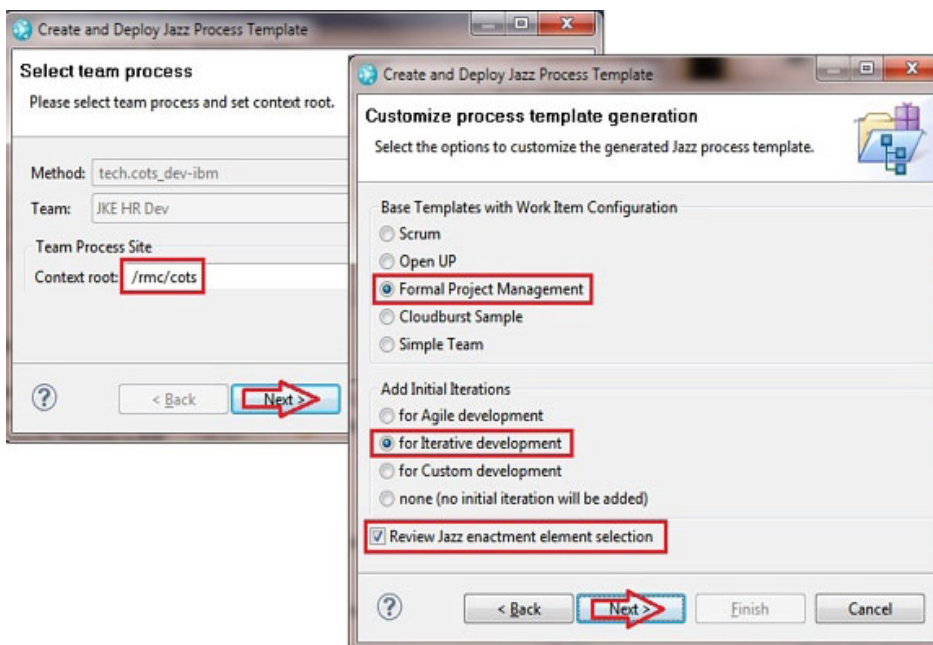
He needs to provide additional information to create the process template:

- Name of the base template that he will use, because it provides an initial process configuration

- Default values for process elements
3. Peter finds a description of each [process template](#) in the Rational software information center.
 4. In the **Customize process template generation** view, he decides to use the **Formal Project Management** base template, because it matches the formality of a COTS development and delivery project. He also decides to add initial iterations to the timeline to support the **iterative development** defined in the COTS process description.

Figure 2 shows those selections.

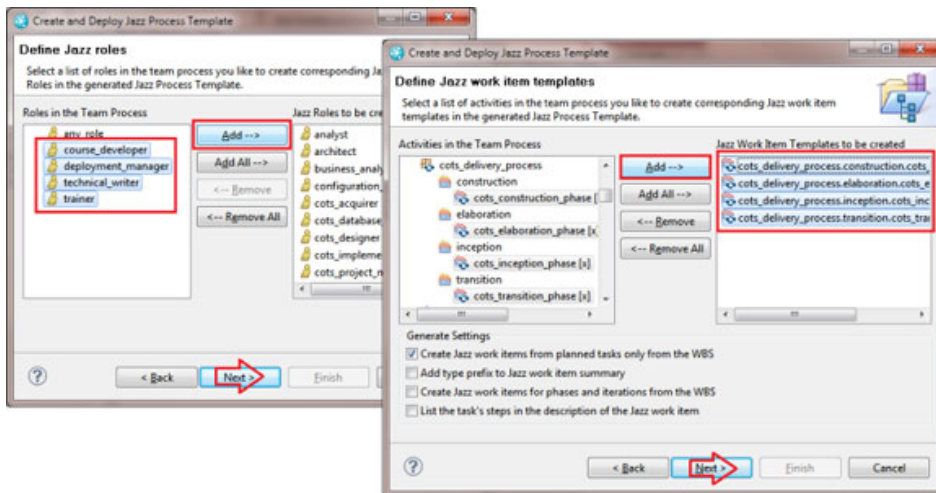
Figure 2. Initial selections for creating the process template



5. Next, Peter and Kelly review the elements from the Rational Method Composer process that they can add to the Rational Team Concert process template.
6. Peter selects all roles -- except any_role -- to add them to the process template.
7. Next, from the Rational Method Composer work breakdown structures, he selects activities to be created as work item templates in the process template.

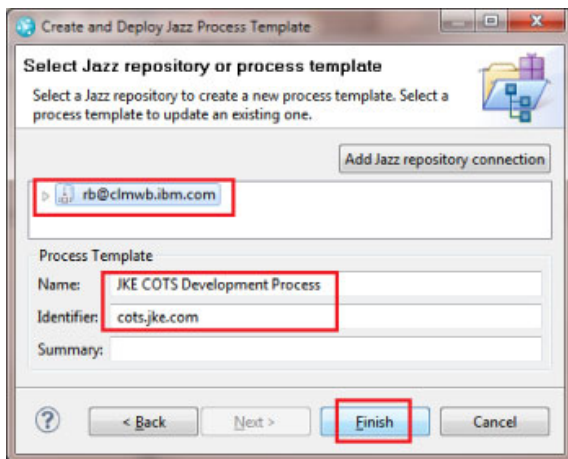
Figure 3 shows these actions in two windows: Define Jazz roles, Define Jazz work item templates.

Figure 3. Additional selections for the process template creation



8. As the final steps in creating the process template, in the **Select Jazz repository or process template** window (Figure 4), under Add Jazz repository connection, Peter selects the Jazz Team Server where the process will be deployed, and then he enters the process template name and identifier (cots.jke.com).

Figure 4. Final selections for the process template creation



The process template is now available in Rational Team Concert, and it can be used as the template for project areas.

Note:

Rational Method Composer also provides capabilities to create new work item types, as described in the IBM Technote on [How to modify an existing method type](#). To save time, the team used the default work items types specified in the base process template.

Create a project area in Rational Team Concert

1. In Rational Team Concert, Kelly creates a project area for the JKE HR Development team by using the JKE COTS Development Process template created on the previous step and following the guidance in the [Creating project areas](#) information center topic.

2. She follows the standard steps to set up the project area:
 - a. Add members to projects and assign team members to each role that they will perform in the project.
 - b. [Define categories that work items can be filled against](#).
 - c. Fine-tune the provided timeline with iteration numbers and dates (see Figure 5).

Figure 5. JEK HR Development project timeline with seven iterations



Run the project and access process guidance

The project area created by using the process template in previous steps contains work item templates that resemble different pieces of the work breakdown structure defined in Rational Method Composer. For each of the project lifecycle phases (for example, Inception, Elaboration, Construction, and Transition) there is a corresponding work item template in Rational Team Concert, and each work item template contains tasks ready to be created and to populate iteration plans.

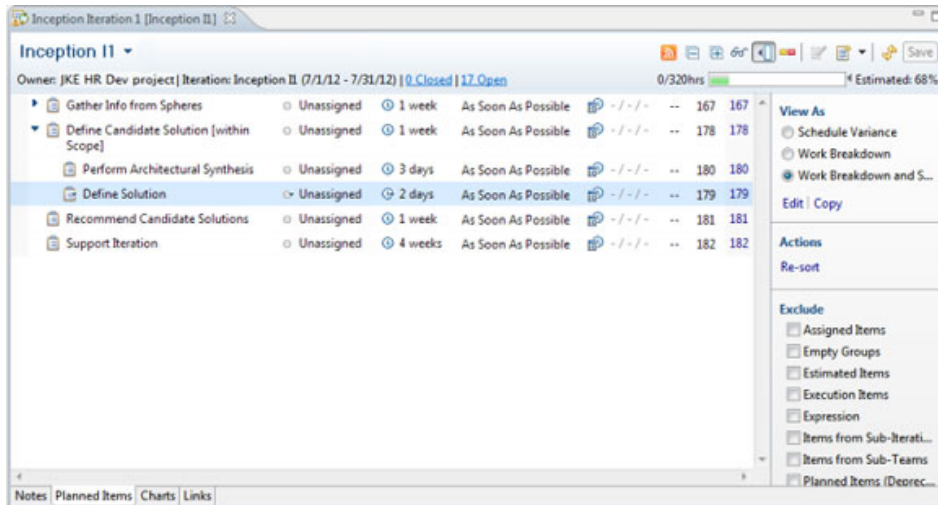
1. As part of planning and scheduling tasks, Kelly creates an iteration plan for the first iteration, Inception I1. She follows guidance on how to create an iteration plan on the [Creating plans](#) information center topic.
2. She assigns the plan to the development team.

The resulting plan has no tasks (or planned items) in it yet.

3. Kelly follows instructions from [Creating work items from a template](#). To add tasks to this plan, she uses the COTS Inception Iteration work item template. .
4. She files the work items against the Iteration Tasks work item category defined earlier and plans those items to be completed in Inception I1.

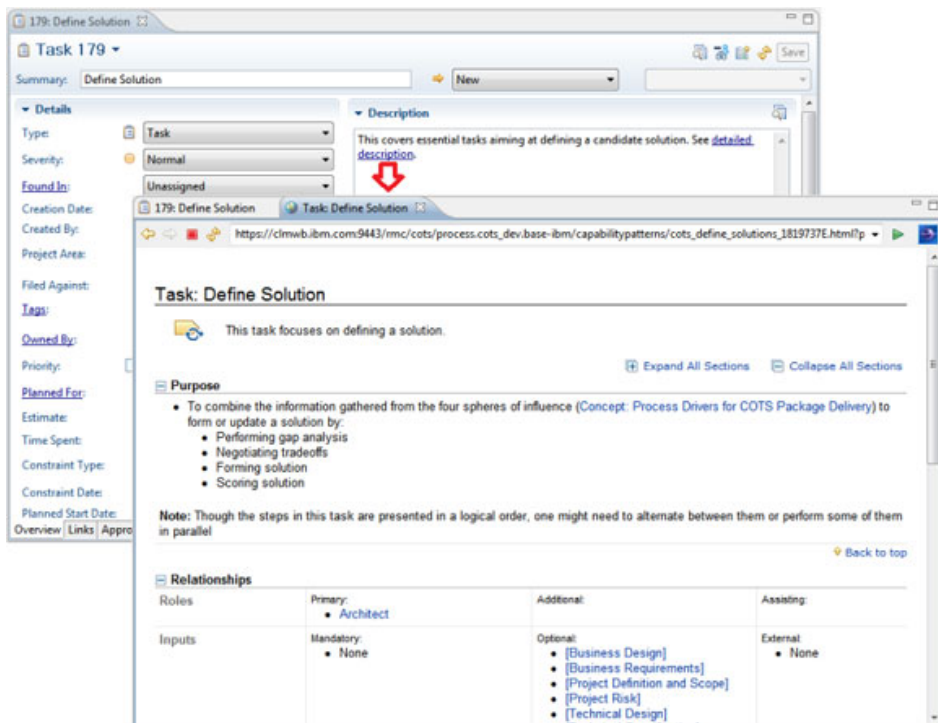
The resulting plan looks like the one shown in Figure 6.

Figure 6. Iteration plan for first project iteration



From the tasks created in the plan, team members have access to detailed process description that explain how to perform each task, what roles are involved, what artifacts are used to perform the task, what artifacts are created or updated as a result, and so forth, as shown in Figure 7.

Figure 7. Accessing process guidance from a Rational Team Concert work item



Summary

In this article, you saw how the JKE HR development team used existing practices and easily tweaked the content to represent their needs. They quickly created a process template to start

a new project. Then they easily populated plans with predefined tasks and accessed contextual process guidance from each task to get them up to speed on the team's process.

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