Lab 1. Overview of Rational Method Composer

Overview

IBM® Rational® Method Composer (RMC) is a flexible process management platform with a method authoring tool and a process asset library to help you implement measured improvement of your enterprise, systems engineering or software delivery processes. IBM Rational Method Composer tooling lets you create, edit, manage and publish process descriptions. The process and practice libraries provide best practice content that you can reuse as is or tailor to compose your own processes.

In this lab you will explore some of the basic features of RMC, including how process guidance can be accessed from Rational Team Concert work items.

Prerequisites

If starting from scratch (not using the cloud image)

1. Download the latest RMC from https://jazz.net/downloads/rational-method-composer/

2. Install RMC.
   In the cloud environment, installed to C:\IBM\RMC7.5.3.1

3. If you need to use RMC for more than a month, then use IBM Installation Manager to upload and activate an authorized user license key.

4. Download the latest solutions library from
   http://www.ibm.com/support/docview.wss?uid=swg24030663
   In the cloud environment, it has been unzipped it into C:\IBM\sol_lib753_20180913

5. Search the library directory (on the cloud C:\IBM\sol_lib753_20180913) for "aalm.jpg" and copy it to a convenient location (the lab assumes C:\IBM) to make it easier to find and use in the labs.

6. Install and configure Rational Team Concert. Also install and configure Rational DOORS Next Generation if you plan to also do Lab 3: Web-based authoring tech preview.

   a. Install version 6.0.5 or 6.0.6.1, as there is a bug in 6.0.6 that interferes with lab 2.

   b. Create an RTC Project area called JKE Account Management Program using the latest SAFe process template for programs.

   c. Create a user that has rights to create work items ("stakeholder" role is sufficient), such as ID "rebecca" with password "rebecca".

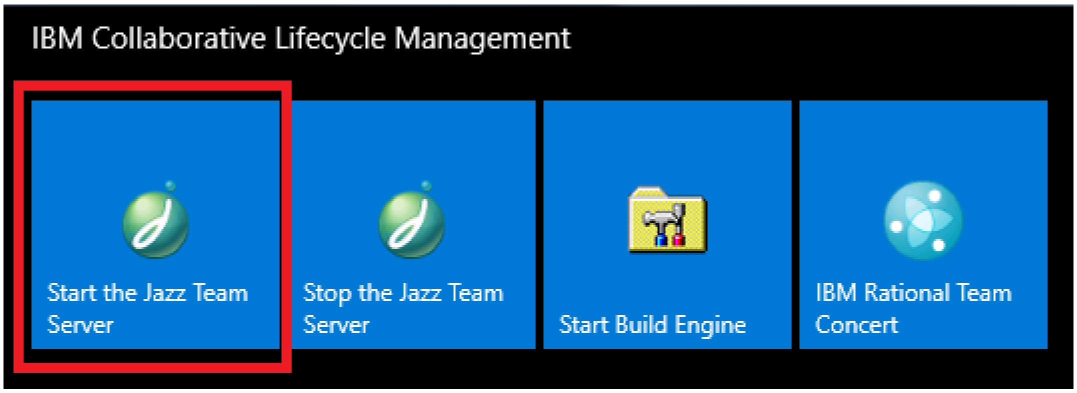
   d. Create start menu shortcuts to launch the Jazz team server and RMC.

Tasks

Task 0. Setup

Set up the environment for this lab.

1. From the start menu, Launch the Jazz team server.

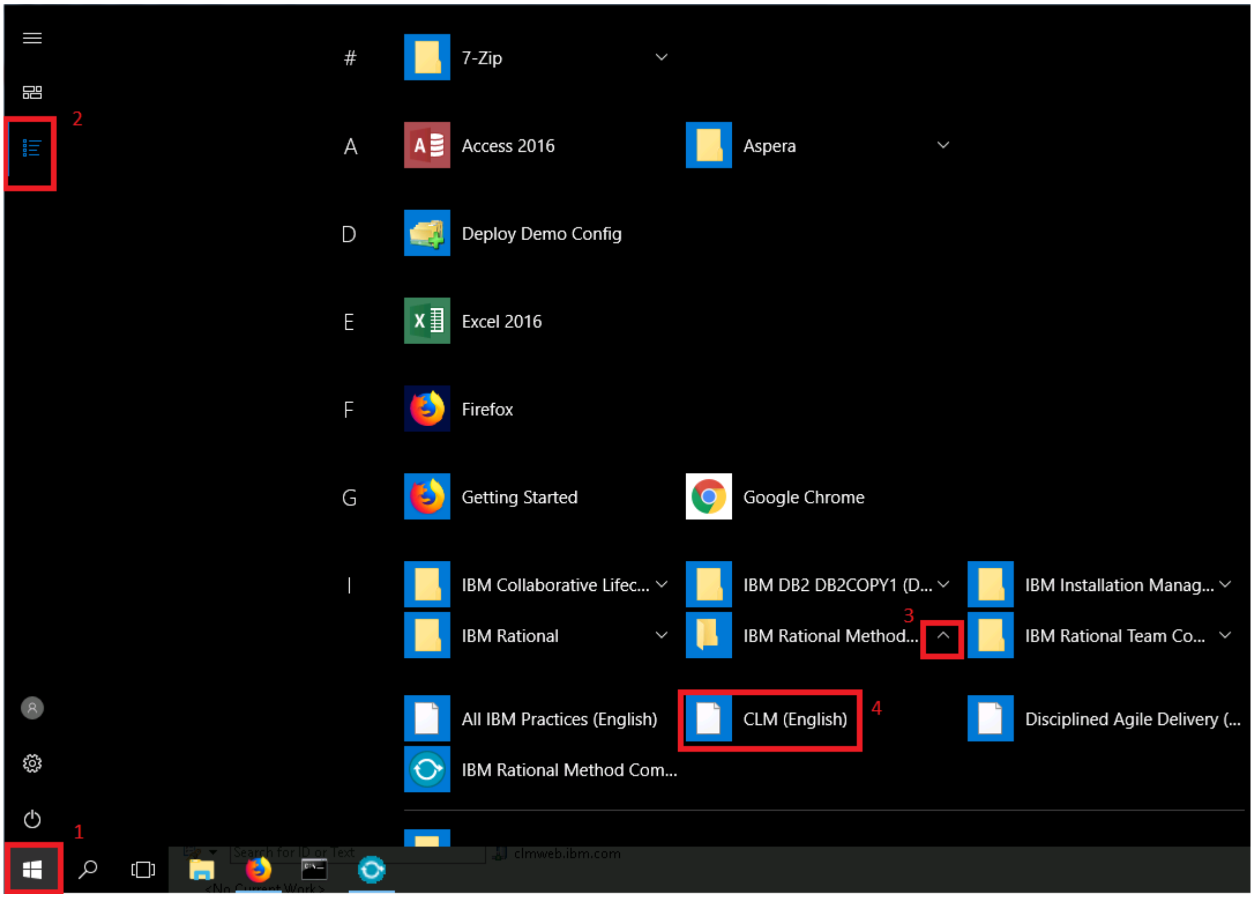


While waiting for the server to begin, you can start on the lab tasks below. By the time you start task 3 (accessing process guidance from Rational Team Concert work items) the server should be ready.

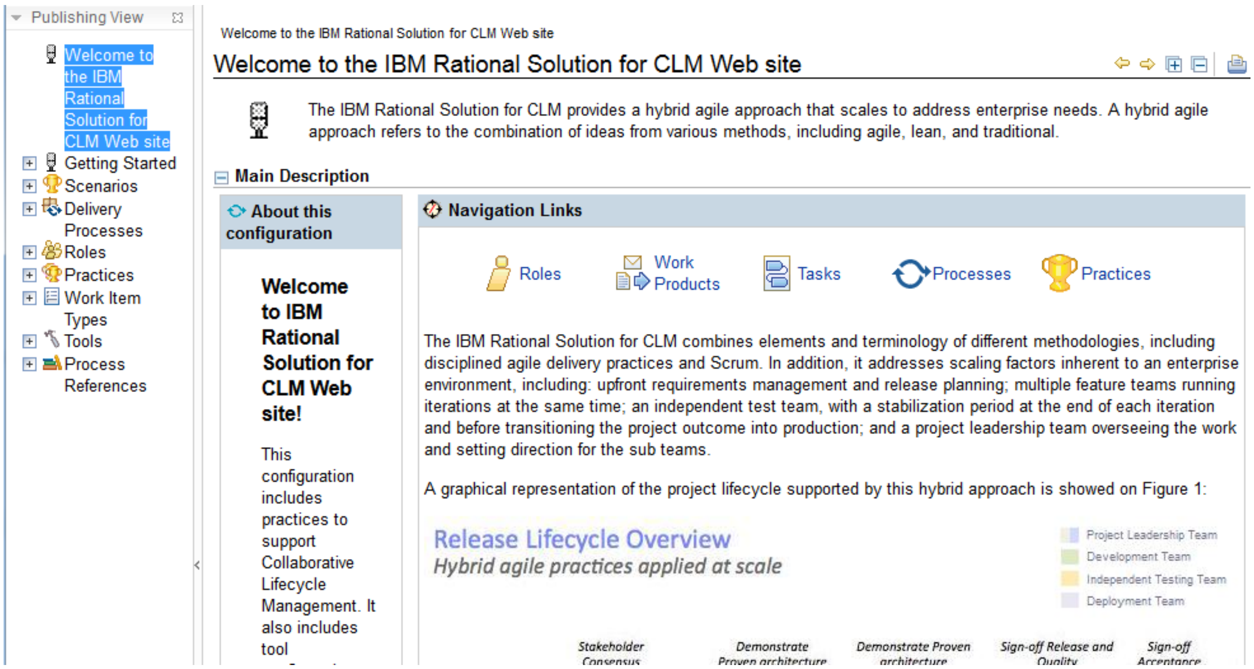
Task 1. Browse a process Web site

In this task, you will browse a Web site generated from Rational Method Composer and observe the different types of method elements and their relationships.

1. Open the CLM website
   a. Click menus in the order shown in red below (it may look different in your version of Windows)



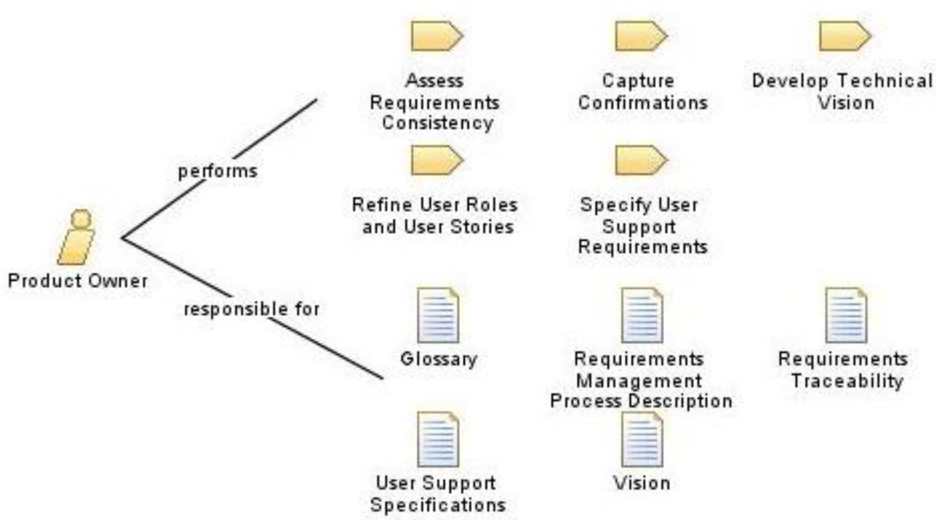
2. The Web site should open in your default browser (Firefox on the cloud image), and you should see something like this:



This is an example process Web site generated by Rational Method Composer. It is for a team of teams using the IBM Rational CLM suite of tools and performing agile software development at scale.

a. Observe the treebrowser on the left, which is a table of contents for the Web site. The element selected in the treebrowser has its contents displayed on the right.

2. Click in the treebrowser to browse to **Roles** > **Development Team** > **Product Owner**



Observe the diagram (generated by RMC) that displays the tasks the role performs and the work products the role is responsible for.

3. Click the task **Develop Technical Vision** on the diagram.
Observe the relationships from the task to the performing roles and input/output work products.

Also observe that there are steps which can be expanded to display the details of how to perform this task.

Relationships

Roles	Primary Performer: • Product Owner	Additional Performers: • Architect • Project Manager • Stakeholder
Inputs	Mandatory: • None	Optional: • [Business Design] • Vision
Outputs	• Glossary • Storyboard • Vision	

Steps

- Identify stakeholders
- Gain agreement on the problem to be solved
- Gather stakeholder requests
- Define the scope of the solution
- Define features of the system
- Achieve concurrence
- Capture a common vocabulary

4. Click the output work product **Vision**.

a. Observe that it has a template and checklist.

b. Observe the breadcrumb path at the top of the page. This tells us where the element is located in the treebrowser table of contents.

Process References > Guidance > Practices > Shared Vision > Work Products > Vision

Artifact: Vision

This artifact defines the view of the stakeholders of the technical solution to be developed. This definition is specified in terms of the key needs and features of the stakeholders. The vision contains an outline of the envisioned core requirements for the system.

5. In the treebrowser, expand **Delivery Processes**.

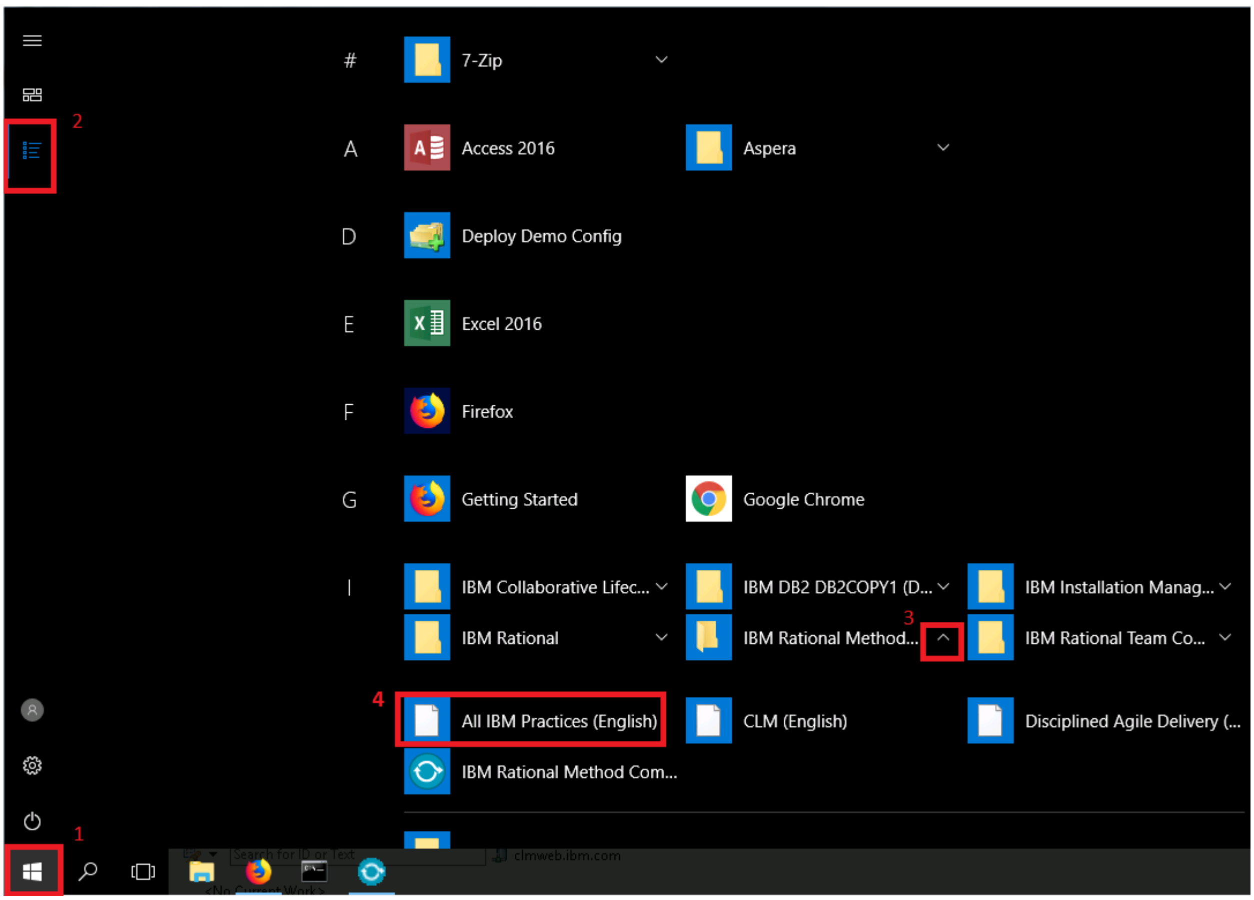
a. Observe that we have defined workflows for each of 3 types of teams, one or more **Development Teams**, the **Independent Test Team**, and the **Project Leadership Team**.

6. In the treebrowser, click **Independent Testing Team Workflow**
   a. Observe that there is a diagram (created with drawing tool and copied into RMC) and a breakdown structure at the bottom.
   b. Expand the breakdown structure in table at the bottom as follows: **Construction** > **Iteration [1..n]** > **Test and Evaluate**
   c. Expand the breakdown structure in the treebrowser similarly Expand **Test and Evaluate**.
7. Click on **Test and Evaluate** in the treebrowser to see the details and breakdown of that element.
   a. Expand **Design Test.**
   b. Click on the task **Define test strategy**. This is the lowest level in the hierarchy.

Task 2. Browse the All Practices Web Site

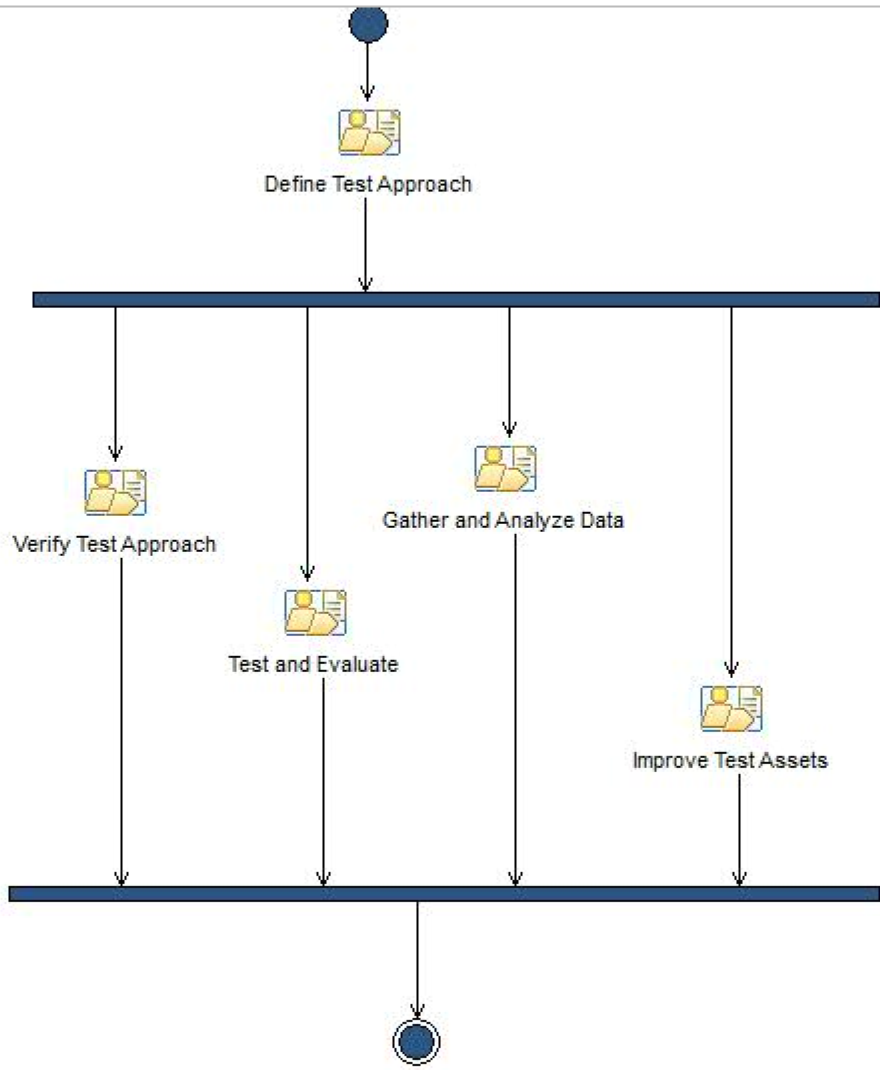
The previous web site was configured from reusable practices that are part of the IBM Practices library. In this task, we will look at some of those practices, and also see example of diagrams that can be created using RMC.

1. Open the "All IBM Practices (English)" Web site as follows:



2. Expand the treebrowser under **Practices** to explore the dozens of practices available in the library, covering Enterprise, Systems Engineering, and Software Development.

3. In the treebrowser, click on **Practices > Software Development > Testing > Independent Testing**
4. Observe that the practice includes adoption guidance, an example process (workflow) template, artifacts, tasks and guidance.
5. Click the **Test Iteration** template
6. Observe the clickable diagram (don't click on it yet) which was created using RMC's diagramming feature. Also observe the matching hierarchical work breakdown structure below the diagram.



Work Breakdown

Breakdown Element	Steps	Index	Predecessors	Model Info	Type	Planned
Define Test Approach		1			Activity	✔
Verify Test Approach		6	1		Activity	✔
Improve Test Assets		12	1		Activity	✔
Gather and Analyze Data		19	1		Activity	✔
Test and Evaluate		24	1		Activity	✔

a. Expand **Test and Evaluate** in the WBS table

b. Click on **Test and Evaluate** in the diagram to see the same “next level” breakdown.

c. This is the same “Test and Evaluate” that we saw in the CLM process Web site.
(The diagram could also have been reused in the CLM process Web site, but that publishing option was not selected).

Task 3. Accessing Process Guidance from Rational Team Concert work items

You can access process guidance as needed from within tools such as Rational Team Concert. In this task, we will create work items for a team that is developing an account management system for a fictional bank, JKE Bank. Those work items will contain links to an RMC generated process Web site.

1. In Firefox, click the shortcut “Project Areas – CCM” or navigate to https://clmweb.ibm.com:9443/ccm/web.
Login with userid/password rebecca/rebecca.

2. Click to open **JKE Account Mgmt Program**

   A Rational Team Concert dashboard will display that shows the status of the JKE Account Management Program.

3. Click **Work Items > Create from Template**

   a. A list of Work item templates is presented. (Note that these work item templates were created using RMC).

   b. Select the **Program Increment** template, click **Next**

   c. Click **“…”** to set “Filed Against” to the “JKE Account Management” team and “Planned for” to “PI 1” (Program Increment 1).

   d. Click **Finish**

   e. Observe that several work items have been created.

4. Click on the work item **PI Planning Event**.

   This is a work item for planning the first Increment.

5. Scroll down and click the **detailed description** link to get process guidance.

   a. This is a page generated from Rational Method Composer. It lists the roles, input and output work products.

   b. Click the **Details** link to open to SAFe® guidance in a new tab. Close the tab.

   c. Click the **Tool mentor** link to get guidance on how to do SAFe PI Planning using Rational Team Concert.

6. To see the complete “SAFe with the Power of IBM DevOps” process Web site, navigate to

https://jazz.net/safe4.5_practices/ (you can just shorten the URL in the address bar)

Observe that this Web site is navigated differently from the sites we looked at earlier. This one uses a top navigation bar, and the treebrowser is elided. This is just one example of how the look and feel of a process Web site can be modified using the RMC skins feature.

Task 4. Authoring basic method content

So far, we have focused on how users access process guidance. In this task, we will explore how process authors create and publish content.

1. From the start menu, launch IBM Rational Method Composer.

   Rational Method Composer is based on Eclipse, a rich client tool environment.

2. Create a new method library

   a. Click **Authoring** on the button bar.
   (This switches the interface to the Authoring perspective. A perspective is a user interface view.)

   b. Click **File** > **New Method Library**

   c. Set Path to **C:\IBM\my_library** and click **Finish**.

3. Create a plug-in (used for organizing content)

   a. Click **File** > **New** > **Method Plug-in**

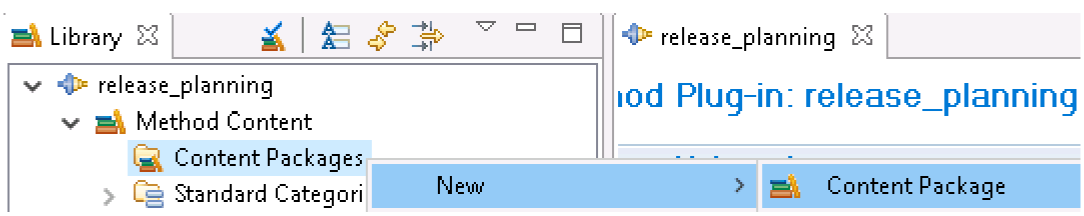
   b. Select "Create a blank plug-in", click **Next.**

   c. Name it "release_planning", click **Finish**.

4. Create a package (used to organize content in a plug-in)

   a. In the Library View, expand release_planning > Method Content

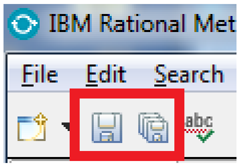
   b. Right click "Content packages" and click New > Content Package



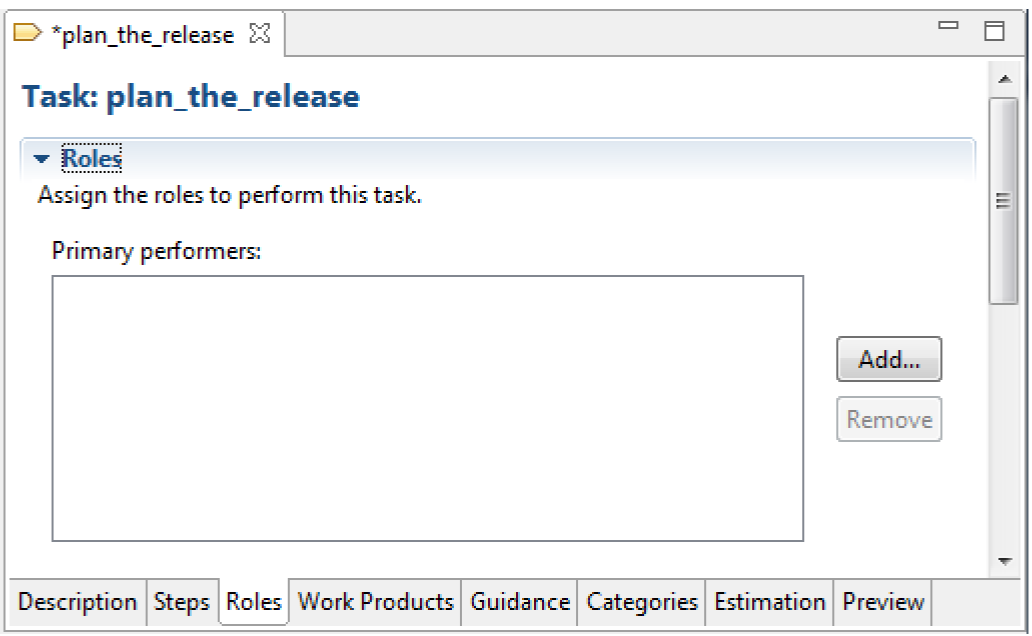
   c. Type "Release Planning"
   Observe that you are typing the "Presentation Name" which is for names that get published. RMC automatically creates an internal "name" above it that is used in reports and file names.

   In the instructions that follow, use the "Presentation Name" whenever instructed to name something, and let the "name" be generated automatically.

   d. Click the Save or Save All button to save the new package.

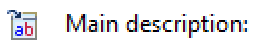


5. Create a new role
   a. Right click on the “release planning” package and click **New** > **Role**
   b. Name it “Release Planner” and save.
6. Create a new work product
   a. Right click on the “release planning” package and click **New** > **Artifact**
   b. Name it “Release Plan” and save.
7. Create a new task
   a. Right click on the “release planning” package and click **New** > **Task**
   b. Name it “Plan the release”.
   c. Click the **Roles** tab at the bottom and click **Add** to add a primary performing role



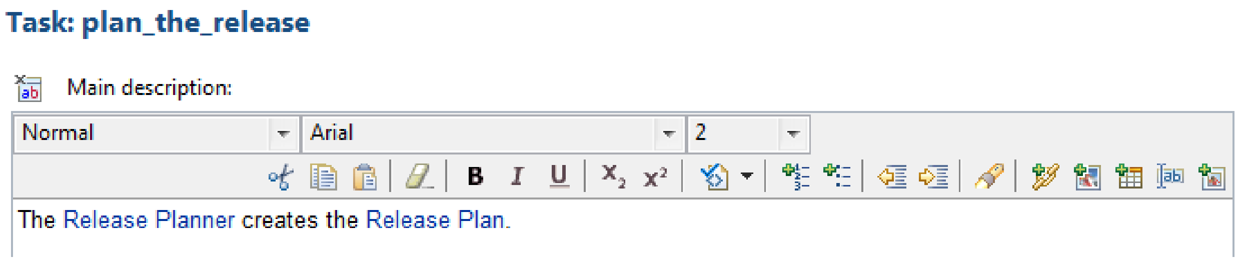
There is only one role to choose from (Release Planner).

   d. Click the **Work Products** tab and beside “Outputs” click **Add** to add the “Release Plan” work product as an output of this task.
   e. Click the **Steps** tab and add steps titled “Invite attendees” and “Book meeting room”.
8. Use the rich text editor to add descriptive text and links
   a. Click the **Description** tab and then click the “Open Rich Text Editor” icon beside “Main Description”.



This opens the rich text editor.

b. Create the following description by typing and dragging and dropping the role and work product from the library view to create the links. Click **Save**.



9. Observe that links are updated automatically

a. Close the task by clicking on the X at the top.

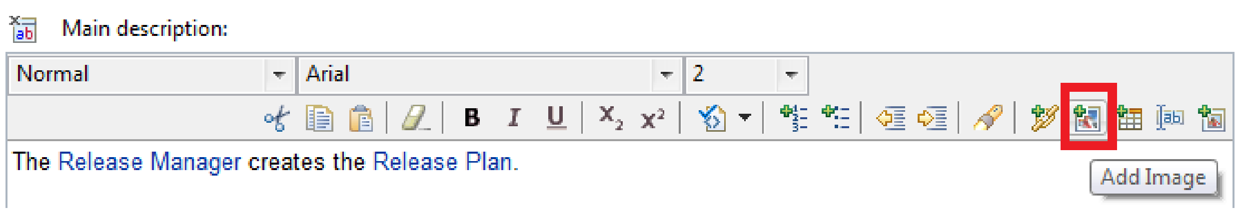
b. Edit the “Release Planner” role and change the presentation name to “Release Manager” and name to “release_manager”. (After creation they are not auto-synchronized). Add a description “This role manages releases”. Save.

c. Edit task “Plan the Release” and click “Preview”. Observe the results of your work so far, including that the role link has changed to match the new presentation name.

10. Try the area map editor

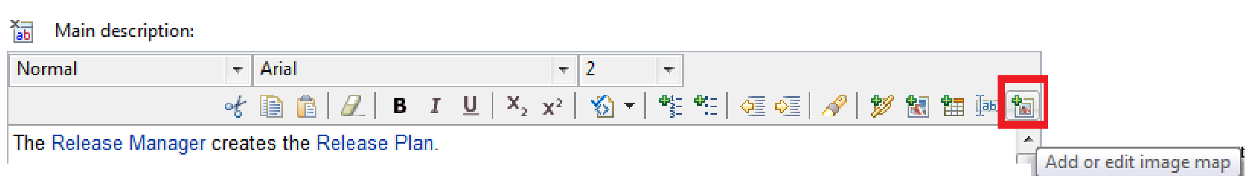
a. Click the Description tab and open the rich text editor again.

b. Click the “Add Image” icon

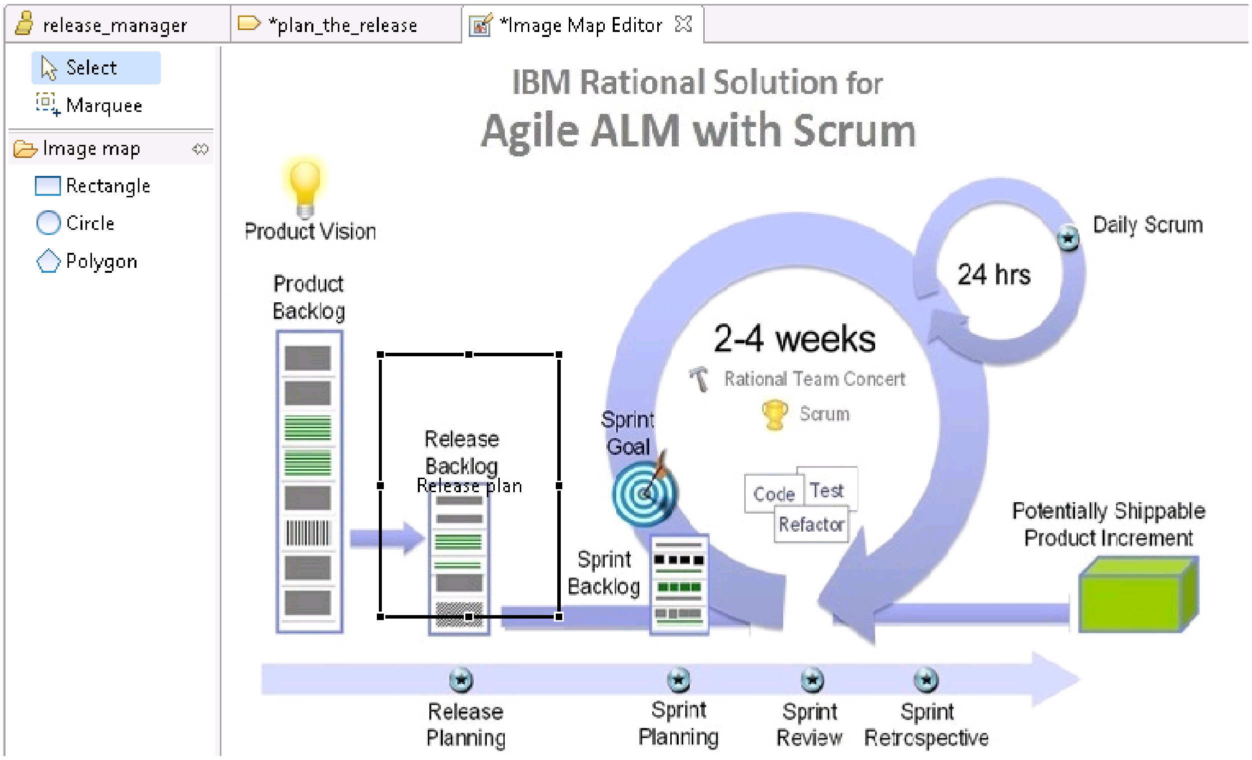


c. Add this image:
C:\IBM\aalm.jpg

d. With the image selected, click the “Add or edit image map” icon (due to a bug, since fixed, it may appear as a red square).



e. Drag and drop the “Release Plan” artifact onto the image of the “Release Backlog” to create a rectangular hot spot.

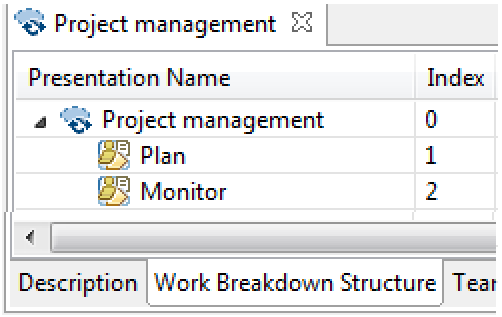


f. Save, then close the image map editor and close the task editor.

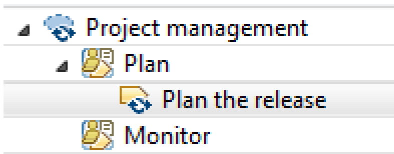
Task 5. Authoring processes

In this task, we will explore how to create hierarchical breakdown structures, called Processes, with dependencies and workflow diagrams.

1. Create a capability pattern (a reusable type of "process")
   a. In the library view, expand release_planning > Processes.
   b. Right click "Capability patterns" and click "New > Capability Pattern"
   c. Set Name to "Project management" and Default Configuration to "-- None --". Click "OK".
2. Add activities and tasks
   a. Click the "Work Breakdown Structure" tab
   b. Right click on "Project Management" then "New Child > Activity" to add an Activity named "Plan".
   c. Repeat to add an Activity named "Monitor".



d. Drag and drop the task from the library view on top of "Plan".

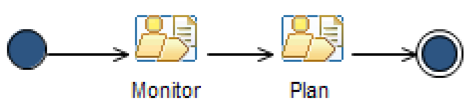


3. Create an activity diagram and dependencies

   a. Right click **Project management** and click **Open Activity Diagram**.

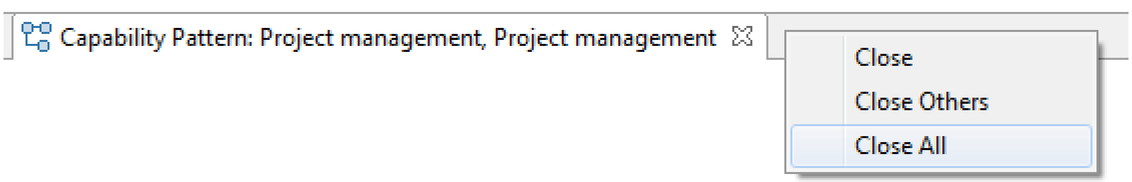
   b. Click **OK** when prompted to create a new diagram.

   c. Use Start Node, End Node and Control Flow to create this diagram.



   d. Click the **Save all** button

   e. Close all editors by right clicking in the empty area on the right as shown below, and clicking **Close All**.



Task 6. Views, Configurations, and Publishing

In this task, we will explore how to create a configuration and publish it, including a "views" that defines the table of contents.

1. Create a custom category (a grouping of elements)

   a. If not already expanded, click in the treebrowser to expand **release_planning** > **Method Content**.

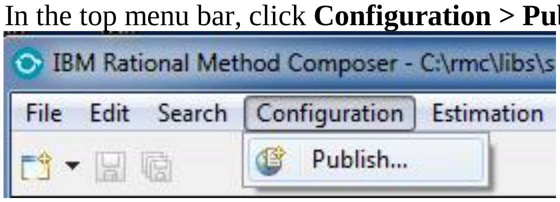
   b. Right click **Custom categories** and click **New** > **Custom Category**

   c. Name it "Table of Contents"

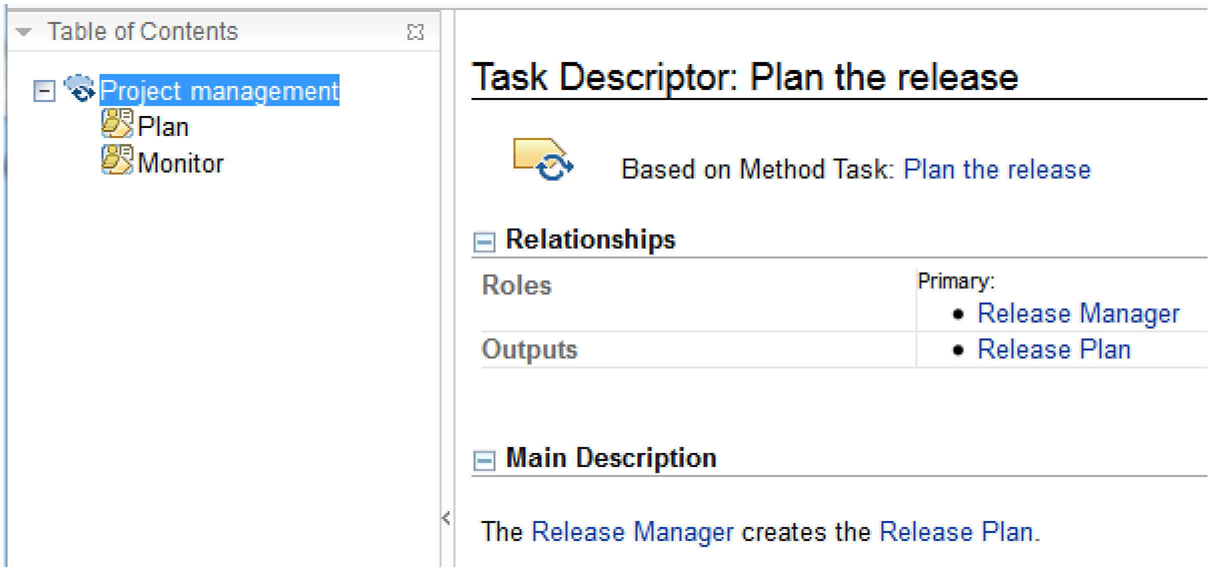
   d. Click the **Assign** tab.

   e. Click the **Assign** button to assign the “Project management” capability pattern. Assign any other elements you would like to see published.

2. Create a configuration (a selection of elements to be published)
   a. In the Library View right click on **Configurations** (at the bottom) and click **New > Method Configuration**.
   b. Name it “my_configuration” and click **Finish**.
   c. Click the **Plug-in and Package Selection** tab.
   d. Click to select the release_planning plugin
   e. Click the **Views** tab
   f. Click **Add View**
   g. Click the **Table of Contents** custom category that you created earlier and click **OK**.
   h. Close all editor tabs (saving as needed).
3. Publish
   a. In the top menu bar, click **Configuration > Publish**



   b. Click **Next**
   c. Click **my_configuration** and click **Next** until you can’t click **Next** any more.
   d. Click to select **Static Web Site** and click **Finish**.
   The process Web site will display in your browser.
4. Browse
   a. Click on **Plan** on the diagram, and then **Plan the release**.
   b. Observe the relationships and text that you defined in previous steps.



Summary

In this lab you have:

- Browsed a process Web site to observe the different kinds of elements and relationships
- Browsed the IBM Practices Library to see the breadth of licensable content available from IBM.
- Created a plug-in and several different kinds of method elements.
- Created rich text content, including element links and area maps
- Created a process (hierarchical work breakdown structure) including a diagram.
- Created a configuration and published it as a process Web site.

This was just a brief overview of RMC. For more information, visit:

https://www.ibm.com/marketplace/rational-method-composer