

This module will cover configuring and using e-mail notification in IBM Rational ClearQuest versions 7.0 or higher



The following topics are covered in this module: the system requirements for using e-mail notification in ClearQuest and the underlying technologies used, enabling e-mail notifications in ClearQuest and ClearQuest Web, and how to configure e-mail rules to adapt e-mail notification to your business requirements.

Upon completion of this module, you will be able to set up ClearQuest to send out notifications by e-mail upon modification of records in your database.



In order to make use of ClearQuest's e-mail notification feature, you need to have an email server available. ClearQuest supports the Simple Mail Transfer Protocol (SMTP), or the Mail Application Programming Interface (MAPI) in combination with a Microsoft[®] Exchange server. Please note that as of the time of writing, there is no support for secure SMTP connections over SSL or SMTP authentication. Also, keep in mind that since MAPI is a proprietary implementation by Microsoft, it is only available on Windows. Therefore, if you have ClearQuest clients running in UNIX or Linux operating systems, you will only be able to use an SMTP server for sending e-mail.



The SMTP is one of the technologies involved in using e-mail notification in ClearQuest. SMTP is used for mail transfer between e-mail servers and for the submission of e-mail from a client to an e-mail server. SMTP runs on TCP port 25 and provides a number of mechanisms to prevent unauthorized access to e-mail servers to keep them from being used for spam.



ClearQuest can use the MAPI, which is a proprietary implementation by Microsoft. It uses a Microsoft Exchange server. MAPI uses TCP port 135 and other dynamically assigned ports.

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 Preparing ClearQuest for e-mail notification Check if e-mail package is installed in your schema 							
Highlight your schema	Schema Summary Schema Names Blank Common DefectTracking DefectTracking Common DefectTracking DefectTrac	Latest Version: Checked Out Checked Out Owner: Associated Databases: No Database	6 Yes admin Associated Packages: Package Name Version Langu ▲ Attachments 1.0 ASCII DefectTrackingSetup 4.0 ASCII DefectTrackingSetup 1.0 ASCII History 1.0 ASCII ♥				
	N 9 2 2	Comments: OK	Help	"Email" package is installed			

The "Email" package needs to be installed in your schema to use the e-mail notification function of ClearQuest. To determine whether you have the package installed, open your Schema Repository in the ClearQuest Designer and select "Schema Summary" from the "View" menu. On the left, highlight your schema. On the right, you will see a list of associated packages. If the "Email" package appears in that list, it is installed in your schema.

Note that the version you see in the window may differ from the version you see in this screen capture. If you do not see the package in this list, you will need to install the package yourself, which is described in the next step.



If the "Email" package is not installed in your schema, you can install it yourself from the ClearQuest Designer. From the "Package" menu, choose "Package Wizard". In the following window (shown here), choose the "Email" package and click "Next". Note that the version that you will see may differ from the one in this screen capture.

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Next, you will be required to select the schema that you want to install the "Email" package in. All schemas that already have the package installed will be hidden. Highlight the schema you want to enable e-mail notification for and click "Next".

	BM Software Gro	pup Rational software	IBM				
Preparing ClearQuest for e-mail notification							
Enable	e a Reco	ord Type					
	Package Wizard - Setup	Record Types for Package I The package "Email" has been successfully installed into your schema. Select record types in your schema which will be enabled but package "Email". Defect Email_Rule Email_Rule EnorLog K Back Finish Cancel Help	Select all Record Types that e-mail notification should be enabled				
		Configuring and using e-mail notification	9 © 2008 IBM Corporation				

The final step will allow you to select all Record Types that you would like to enable e-mail notification for. You will only be able to configure ClearQuest to send e-mail notification for changes made to records that you have selected here. If you do not want to enable all record types at this stage, you can enable additional Record Types at a later time. When complete, click "Finish".

The ClearQuest Designer will automatically check out your schema, and you will see an additional stateless Record Type called "Email_Rule." Check your schema, and upgrade all user databases to finalize the preparation of ClearQuest for e-mail notification.



Now that you have completed the preparation of ClearQuest for e-mail notification, you will need to configure e-mail rules, which determine who will be notified by e-mail once a specific action has been performed on record. E-mail rules are realized through "Email_Rule." In order to create or modify e-mail rules, a ClearQuest user needs to have at least Schema Designer privileges.

BM Sc	oftware Group Rational software	IBM
Configurir	ng e-mail rules	
Enter a descriptive name Choose a record type	Submit Email_Rule	
Check to activate rule	Filter Query: Choose fields to monitor for changes	
	Configuring and using e mail notification © 2008 IBI	11 M Corporation

To create a new e-mail rule, open your ClearQuest Database and select the "Email_Rule" record type from the drop down. This will display a form like the one in the screenshot. On the first tab you specify some general properties of the new e-mail rule, such as the name and the record type that this e-mail rule should apply for. Choose a record type.

You can also choose from the list of all fields belonging to the record type that you wish to monitor for changes. In addition, you can specify a filter query which is used to limit the list of records that this e-mail rule will be applied to. Check the box labeled "Active Rule." Finally, choose an operator to logically link the conditions you define.



On the second tab, "Action Controls," you can configure the actions or states that this email rule should apply for. You can select either "Actions" or "Action Types." Alternatively, you can specify one or more source or destination states. With this, you can configure ClearQuest to only send an e-mail when a record moves into the "Closed" state and not on any other state.

IBM Sc	ftware Group Rational software	BM
Enter the sender of the e-mail	ftware Group Rational software	hat
	Fields to Display: Choose fields to should be displayed in the subject of the notification e-m Include Entire Detect Show Previous Values Choose fields to be displayed in the body of the e-mail	
	Configuring and using e mail notification © 2008 IBM Cor	13 poration

On the third tab, "Display Fields," you can configure what the e-mail will look like and what information it contains.

In the line "From Address," you can enter an e-mail address that will be used as the sender of the notification e-mails. You can also enter "Current User," which causes ClearQuest to automatically insert the e-mail address of the user that is triggering the e-mail notification.

You can choose the fields that should be displayed in the subject of the e-mails. Do not include too many fields here, as the subjects may get too long.

You can also choose the fields that should be displayed in the body of the e-mail. If you check the "Include Entire Defect" box, all fields of the record type will be displayed in the body of the e-mail. If you check the "Show Previous Values" box, the e-mail will include both the current field value and the value before.



Now that you have configured when ClearQuest sends an e-mail notification and what information this e-mail should contain, all you need to configure is who should be receiving these notifications. This is done on the "To Addressing Info" and "CC Addressing Info" tabs. In the field labeled "To Users", you can select from all users in the ClearQuest user database who should be notified. The field labeled "To Groups" allows you to pick one or more groups whose members will be notified. In the field "To Addresses (Fields)," you can select a field that contains either a ClearQuest username or an e-mail address. If the field that you select here contains a ClearQuest username, ClearQuest will retrieve the e-mail address of that user. Finally, in the field "To Addresses (text)" you can enter one or more e-mail addresses that the notifications will be sent to.

In the scenario depicted in the screenshot, a notification will be sent to the user "engineer" and to the user who is the current owner of a record. This concludes the configuration of e-mail rules. You can now configure your ClearQuest clients.



Before you configure your ClearQuest client to send e-mail notification, you should take a few things into consideration.

Since ClearQuest does not send e-mails from a central point but rather from the client on a user's workstation, you need to configure the client on all workstations individually for all users.

If you wish to use MAPI as your e-mail provider, you need to have Microsoft Outlook installed on the same machine as ClearQuest. You also need to install the Collaboration Data Objects (CDO) that come as an optional install as part of the Microsoft Excel installation.

Finally, the latest versions of the CDO that will work with ClearQuest are the ones that came with Microsoft Outlook 2002 Service Pack 1. Please keep in mind that MAPI is only available on Microsoft Windows operating systems and not on UNIX or Linux platforms.



While the screenshots for the following steps show the configuration of e-mail notification in the ClearQuest client, the steps are almost the same for the configuration of the Eclipse-based ClearQuest RCP client and Eclipse with the ClearQuest plug-in. Where differences exist, they are pointed out.

To start the configuration of the ClearQuest client, log in to a user database of your choice and choose "E-mail options" from the "View" menu in the ClearQuest client. In the RCP client, select "E-mail options" from the "Tools" menu.

Select the e-mail provider you wish to use, either SMTP or MAPI. Make sure you check the "Enable E-mail notification" box. Click "Next."



If you chose SMTP as your e-mail provider, you will be prompted to provide both the host name or IP address of the SMTP server that you would like to send e-mail notification through, as well as your e-mail address. This address will appear as the sender of all e-mail notification triggered by the current (Windows) user on this workstation. Click "Finish."



If you chose MAPI as your e-mail provider, you need to select your locally created MAPI profile from the dropdown list. In the RCP client, you will be presented with a text input field where you need to enter the name of the MAPI profile that should be used. Click "Finish."

This concludes the configuration of e-mail notification for ClearQuest. If you are using ClearQuest Web instead of or in addition to locally installed clients, you need to make additional changes, which will be discussed on the following slides.

IBM Software Group Rational software							
E-mail not	tification in ClearQuest Web						
Select SMTP	Security Options Reporting Options Application Options Email Options Sending Email Status: Active (default: Inactive) Mail Transport Type: SMTP •	Enter the host name or IP address of the SMTP server					
	Configuring and using e-mail notification	19 © 2008 IBM Corporation					

If you are using ClearQuest Web and want to have your users notified about changes to records, you need to enable e-mail notification. This needs to be done once by a ClearQuest user who has Super User privileges (usually the "admin" user). All ClearQuest users accessing ClearQuest Web will then have e-mail notification turned on.

To enable e-mail notification, log in to ClearQuest Web and click the "Site Configuration" link at the top of the page. Select the "Email Options" tab to display the settings for e-mail notification. From the drop-down list "Sending Email Status," select "Active," choose "SMTP" as the Mail Transport Type and Fill in the host name or IP address of the SMTP server that you would like to use in the field labeled "SMTP Host". The e-mail address you enter in the field "SMTP Reply To" will be used as the sender of all e-mail notifications, unless the user that triggers a notification (occuring when the user modifies a record) has an e-mail address configured in their ClearQuest user profile. In that case, the value in the field "SMTP Web Server Real Name" will also be displayed as the real name of the sender of the notification.



Using MAPI for e-mail notification in ClearQuest Web requires several changes to the configuration of ClearQuest and Windows.

First, join the machine where ClearQuest Web is installed to the domain the exchange server is on.

Then, go to the "Services" panel in the "Administrative Tools" section of the Windows Control Panel. Right-click "IBM Rational ClearQuest Registry Server" and select "Properties". Switch to the tab labeled "Log On" and select "This account" under the "Log on as:" heading. Enter the login information for the domain user whose Exchange mailbox you will be using and click OK.

Next, make the same domain user a member of the local "Power Users" or "Administrators" group.



Log in to the machine where ClearQuest Web is installed as the domain user whose Exchange account you are using. Create a MAPI profile using the "Mail" pane in the Windows Control Panel. Open Microsoft Outlook to verify configuration was successful.

Next, log back in to the machine as an Administrator and restart the IBM Rational ClearQuest Registry Server service.

Finally, log in to ClearQuest as a user with Super User privileges and select "Site Configuration" from the top nagivation menu. Select the "Email Options" tab. Select "Active" from the "Sending Email Status" dropdown, and choose "MAPI" as the Transport Type. In the MAPI Mail Server field, enter the host name or IP address of the Exchange server, and, in the field labeled "MAPI Mailbox Alias," enter the alias of MAPI mailbox as defined when you created the Exchange account.

Click "Save." This concludes the configuration steps for Email Notification with MAPI for ClearQuest Web.



This section of the module describes the steps required to configure ClearQuest and ClearQuest Web on Linux or UNIX operating systems to use e-mail notification.

On Linux and UNIX operating systems only SMTP is available as a mail transport provider.

The configuration of the RCP client is the same as it is on Windows. The configuration of ClearQuest Web requires additional steps.

	Change Email Opti	ons	>
Configure the email notific protocols.	ation by first choosing a mail transport mechanism.	You can either choose MAPI or SMTP	
	I Enable E-mail noti	lication	
	E-mail Provider.		
		< Back Next > Einish	Cancel

To configure e-mail notification in the RCP Client on Linux or UNIX, select "E-mail Options" from the "Tools" menu. Check the "Enable E-mail notification" box. The E-mail provider defaults to SMTP. Click "Next" to continue.



At the next screen, provide the host name or IP address of the SMTP server you would like to use to send e-mails and the e-mail address that will be used. Click "Finish."



The configuration of ClearQuest Web on Linux or UNIX consists of four basic steps: identifying who owns the Request Manager process, creating directories and files, modifying the SendMail file that holds the configuration settings, and verifying these settings in Site Configuration.



To identify which user owns the Request Manager process, run ps –ef and grep for "request". This should return a process similar to the one shown on the slide. The important part is the first word, which in this case is "nobody". This means that the user "nobody" owns the Request Manager process. You may have changed the configuration of ClearQuest so that the user is no longer "nobody," and instead is "clearquest" or something similar. Write down that user name.



After you have determined which user owns the Request Manager process, you need to find out their home directory.

- On a terminal, change to that user's home directory and run mkdir –p .Rational/.Registry/ClearQuest to create the required directory structure.
- Using the "touch" command, create a file called "SendMail", making sure you type an uppercase S and an uppercase M.
- Finally, you need to give the owner of the Request Manager process read, write and execute rights on the entire Directory Structure and the "SendMail" file.



Open the "SendMail" file in an editor of your choice. You will need to add three lines in that file. It is important that you pay close attention to the spelling and punctuation or the settings will not work.

The first line, "SendActive:" can be a 1 or a 0. 1 means that the e-mail notification is on, 0 means that it's off.

The second line, "ReplyTo:" stores the e-mail address that ClearQuest Web will use as a sender of e-mail notifications.

The third line, "SMTPHost:" is used to specify the host name or IP address of the SMTP server to be used for sending e-mail notifications.

Save the file when you are done.

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Configuring ClearQuest Web on Linux and UNIX							
4. Verify settings in Site Configuration							
	Security Options R	eporting Options	Application Options	Email Options			
	Sending Email Status:	Active 💌 (default: Inactive)					
	Mail Transport Type:	SMTP 💌 (default MAPI)					
	MAPI Mail Server:	(default: none)					
	MAPI Mailbox Alias:	(default none)					
	SMTP Host	smtp.company.co (default: localhost)	m				
	SMTP Reply To:	clearquest@comp (default: none)	any.com				
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To verify the settings in ClearQuest Web:

- Log in to ClearQuest Web and click "Site Configuration" from the top navigation bar.
- Switch to the "Email Options" tab to check if the settings you have made in the "SendMail" file are correctly represented here.
 - If so, this concludes the configuration steps for e-mail notification in ClearQuest Web on Linux or UNIX.
- If the settings displayed are different, make sure you have properly set the permissions in Step 2.
- If it still fails to display correctly, contact Rational Client Support for assistance.



In summary, this module covered the basic concepts behind e-mail notification and how ClearQuest uses them. You should know how to configure e-mail notification on Windows and on Linux/UNIX platforms for the RCP client, the native client and ClearQuest Web. Remember that the configuration for the RCP and the native client needs to be done for every user individually, and that MAPI is only available on Windows.



Your feedback is valuable.

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