Best Practices for customizing IBM Rational Team Concert

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This Presentation is Good for You if

- You know what Rational Team Concert is
- You understand the basic ideas and concepts of RTC
- You would like to use RTC for real
- You are wondering what a reasonable approach is
- Your questions are still somewhat general but are getting more specific





Agenda

- Why Customization?
- Experiences with the Scrum Process Template
- Best Practices





Why Customization?

- RTC provides a good Out-of-the-Box experience:
 - Minimal setup for most cases
 - No customization required
- However: RTC is highly customizable Why?
 - Different organizations have varying requirements for project governance
 - Different teams want to adapt the tool to the process that works best for them
 - Important for agile teams: continuously adapt and improve
- What is the Goal of this Talk?
 - Learn what's in a process template
 - Get started with tweaking the process to the way your team needs it





Customizations: Scope

- RTC supports customizations for these capabilities:
 - Process (Jazz Foundation)
 - Work Items
 - Planning
 - Dashboards
 - ▶ SCM
 - Build
- Focus of this talk:
 - Only common customizations
 - Components:
 - Process
 - Work Items
 - (Planning, Dashboards)





Demo Example

- Scrum Process Template
 - Scrum is a popular approach to manage projects in an agile way
 - Most fleshed out process template
 - showcase for many interesting RTC features
 - more info about Scrum:
 - <u>http://www.ibm.com/developerworks/rational/library/08/0701_ellingsworth/</u>











What was done? - Summary

- New Work Item types:
 - some with additional custom attributes
 - some with custom workflows
 - new layouts for work item types
 - new shared queries
- Tighter Permissions
 - based on Scrum specific roles
- Required attributes
 - state specific: Work Item can only be closed if it has Owner
- Scrum specific plan types, e.g. a Sprint Backlog
- Role based Dashboards



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How is it done?

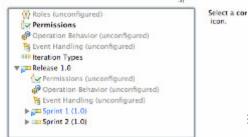
Project Area:

- Roles
- Project configurations
 - Initialization
 - Role based Operations
 - Configurations
- Team configurations
 - Role based Operations
 - Timeline/Role based Operations

• Team Area (optional):

- Roles
- Role based Operations
- Timeline/Role based Operations

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Overview Links Process Customization Process Customization Source



Process Customization: Operations

Example:

- Save Project Dashboard": project level
- "Save Work Item": team level

Operation Permissions:

- Based on finer grained "actions":
 - Create Work Item
 - Modify Work Item
 - Modify Attribute "Priority" of Work Item

Operation Behavior:

- Preconditions, e.g. "Required Properties"
- Follow-up actions, e.g. "Create Initial Work Items"











Work Item Types & Custom Attributes

• Work Item Type defines:

- Display name, Icon
- Built-in attributes: e.g. Summary, Description, Owner, Creator, ...
- Optional custom attributes
- A state transition matrix (aka workflow)
- Scrum Examples:
 - Build Tracking Item
 - Story
 - Conditions of Acceptance: Large HTML
 - Adoption Item
 - Impact: Custom enumeration
 - Affected Teams: Team Area list

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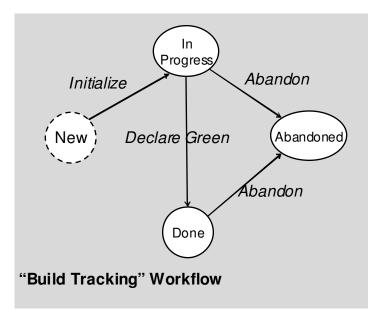
Work Item Workflows & Workflow Bindings

A Workflow consist of:

- States
- Actions
- Resolutions (optional)

Workflow Bindings

- bind workflow to work item type
- workflows can be shared
- Scrum Examples:
 - User Story Workflow
 - Build Tracking Workflow













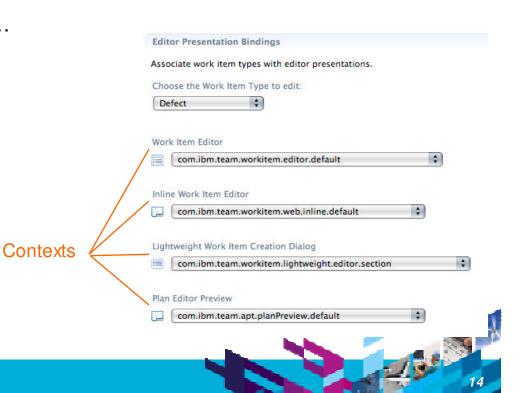
Customizing the UI – Editor & Attribute Presentations

Editor Presentations

- Define how a work item is presented based on:
 - Tabs, Sections, Attribute presentations
 - Small number of predefined layouts (no free-form layout yet)
- Can be used in various contexts:
 - Editor, inline editors, dialogs, hovers, ...

Editor Presentation Bindings

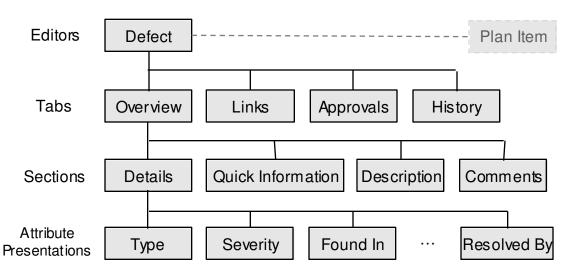
- Bind presentation to work item type
- Presentations can be shared





Editor Presentation

Editor's UI element hierarchy:



- RTC 2.0 supports structural editing
 - children can be added/removed to/from container

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Editor Presentation Layout

- Layout limitations:
 - Tabs have predefined 'section slots'
 - Sections can be added to slot but not arbitrarily positioned
- Web UI uses same slots
 - but different layout
- Similar limitation for Sections
 - Attributes can be added but not arbitrarily positioned

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