Lifecycle Project Administration

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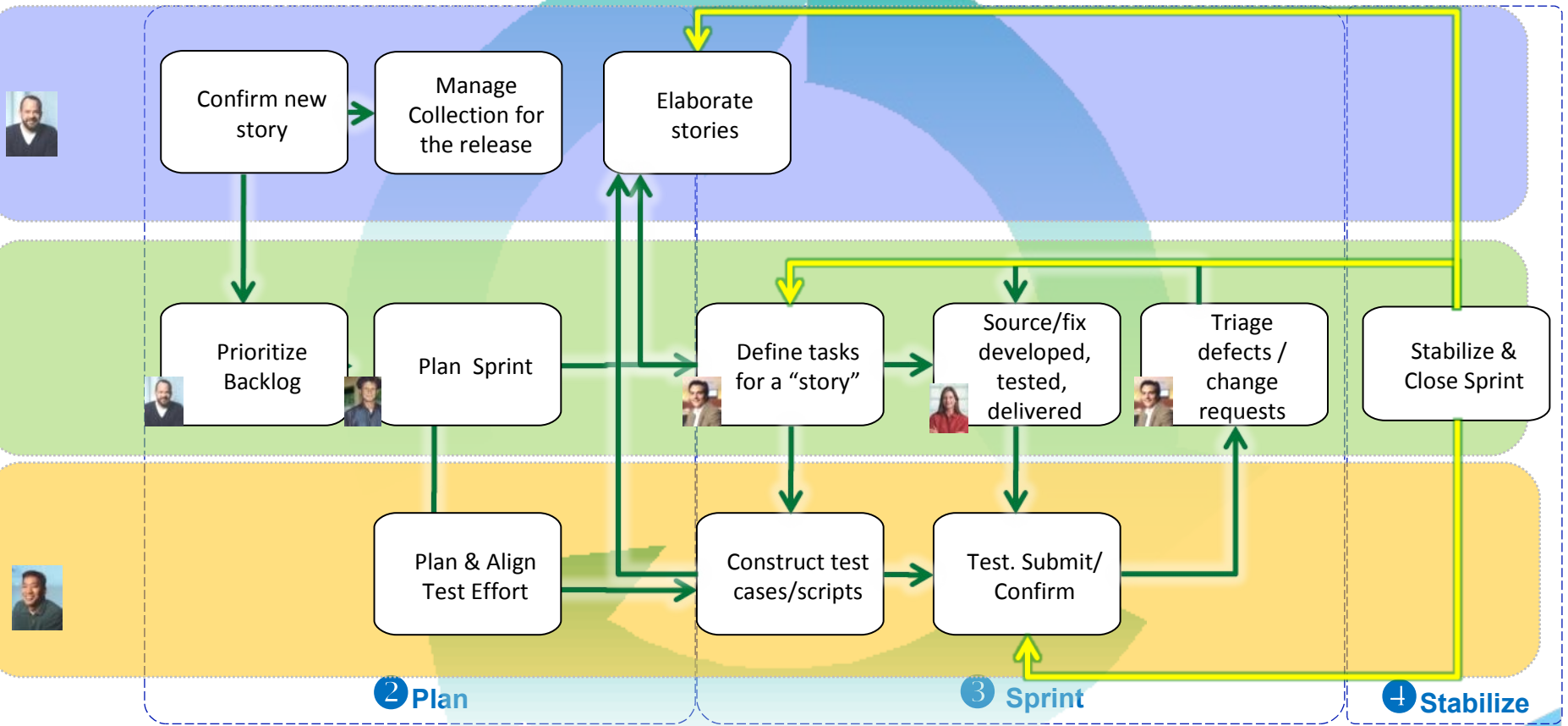
Challenges

Tasks

- "I'm Bob the **Product Owner**."

- "I'm Scott the **Scrum Master**."

Marco, Deb **Dev Lead**. Developer

- "I'm Tanuj, a **Tester** in the team."

Confirm new story	→ Manage Collection for the release

Elaborate stories

Prioritize Backlog

Plan Sprint

Define tasks for a "story"

Source/fix developed, tested, delivered

Triage defects / change requests

Stabilize & Close Sprint

Plan & Align Test Effort

Construct test cases/scripts

Test. Submit/ Confirm

❷ **Plan**

❸ **Sprint**

❹ **Stabilize**

..generate linked artifacts
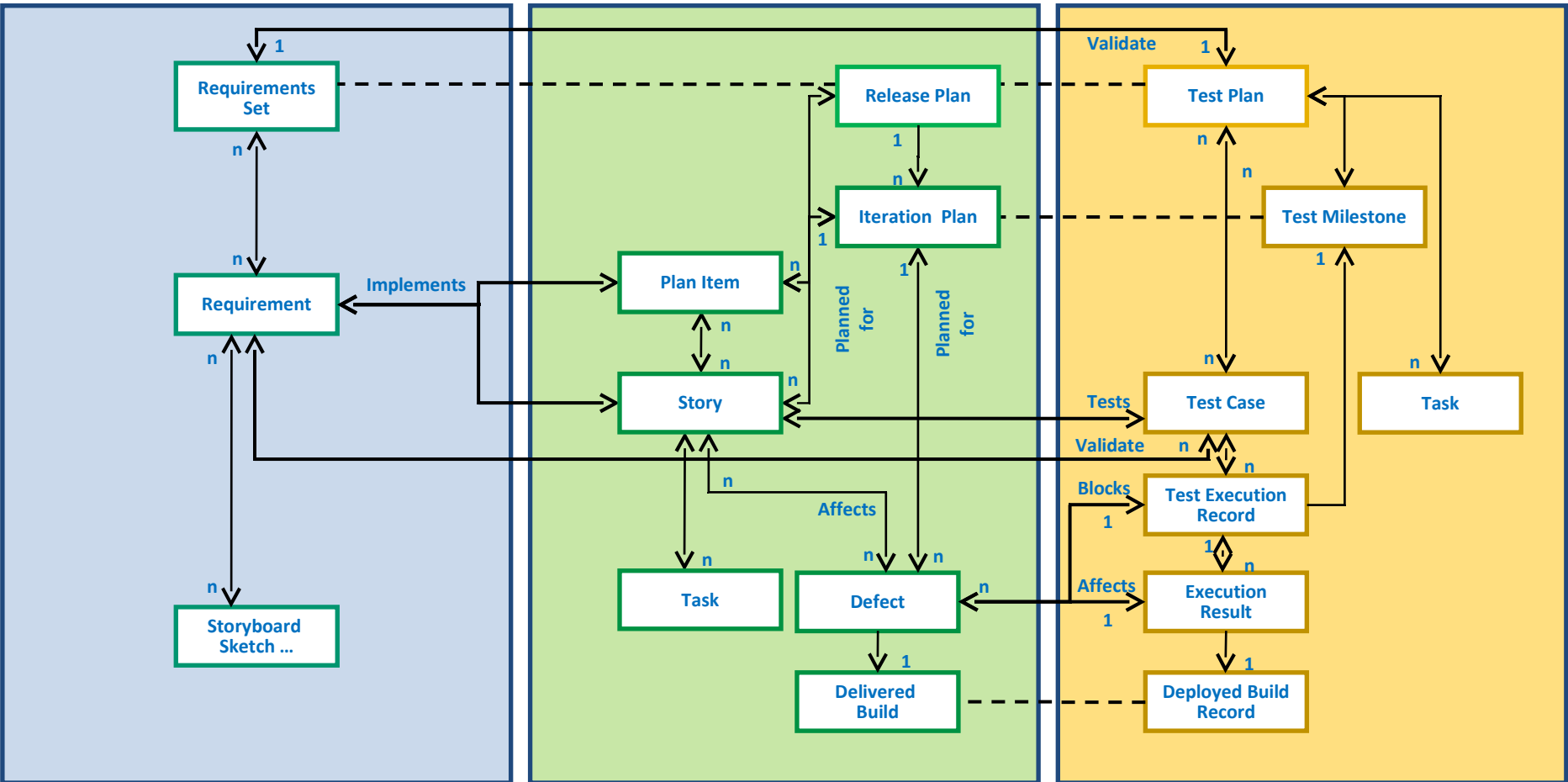
JKE Banking (Requirements)   JKE Banking (Development)   JKE Banking (Test)

..in a network of Project Areas

▼ JKE Banking (Change Management) in '/ccm' for 'Change and Configuration Management'
　└→ Provides 📇 Defects to JKE Banking (Quality Management)
　└→ Provides 📇 Implementation Requests to JKE Banking (Requirements)
　└→ Provides 📇 Quality Management Tasks to JKE Banking (Quality Management)
　└→ Provides 📇 Requirements Change Requests to JKE Banking (Requirements)
▼ JKE Banking (Quality Management) in '/qm' for 'Quality Management'
　└→ Uses 📇 Defects from JKE Banking (Change Management)
　└→ Uses 📇 Quality Management Tasks from JKE Banking (Change Management)
　└→ Uses ☑ Requirements from JKE Banking (Requirements)
▼ JKE Banking (Requirements) in '/rm' for 'Requirements Management'
　└→ Uses 📇 Implementation Requests from JKE Banking (Change Management)
　└→ Provides 📇 Requirements to JKE Banking (Quality Management)
　└→ Uses 📇 Requirements Change Requests from JKE Banking (Change Management)

..hosted by a network of tools
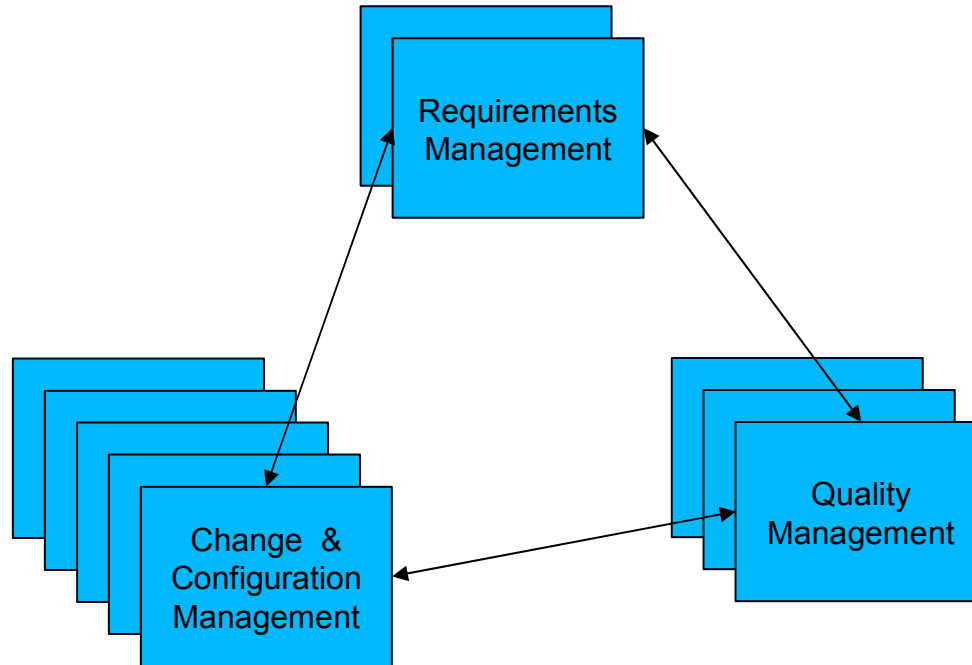
Challenges

- **Choose and link applications**
  - ‣ unify user accounts
  - ‣ provide Single-Sign-On
- **Choose collaboration model**
- **Select a set of matching process and project templates**
- **Create project areas**
- **Create appropriate project area associations**
- **Manage project area membership**
- **Coordinate role assignment across project areas**
  - ‣ A Product Owner should be able to author requirements
- **Assign licenses**
- **Ensure matching license assignment**

- **What term / phrase should we use to refer to these?**

Associations / Link Types

Source Domain	Target Domain	Link Type	Inverse Type	Icon	Artifacts
QM	CM	tests	tested-by		Defects
QM	CM	tracked-by	tracks		Quality Management Tasks
QM	RM	validates	validated-by		Requirements
RM	CM	implemented-by	implements		Implementation Requests
RM	CM	tracked-by-cm	tracks-rm		Requirements Change Requests
CM	CM	related-to	related-to		Related Change Requests
SCM	CM	changes-tracked-by	tracks-changes		Change Requests
AM	CM	architects	architected-by		Change Requests
AM	QM	validated-by-am	validates-am		Quality Management Artifacts
AM	RM	elaborates	elaborated-by		Requirements

Lifecycle Project

Lifecycle Project

Lifecycle Project

Association

Money That Matters

Quality Management Tasks

JKE Banking (Test)

Requirements

Defects

JKE Banking (Development)

Implementation Requests

Requirements Change Requests

JKE Banking (Requirements)
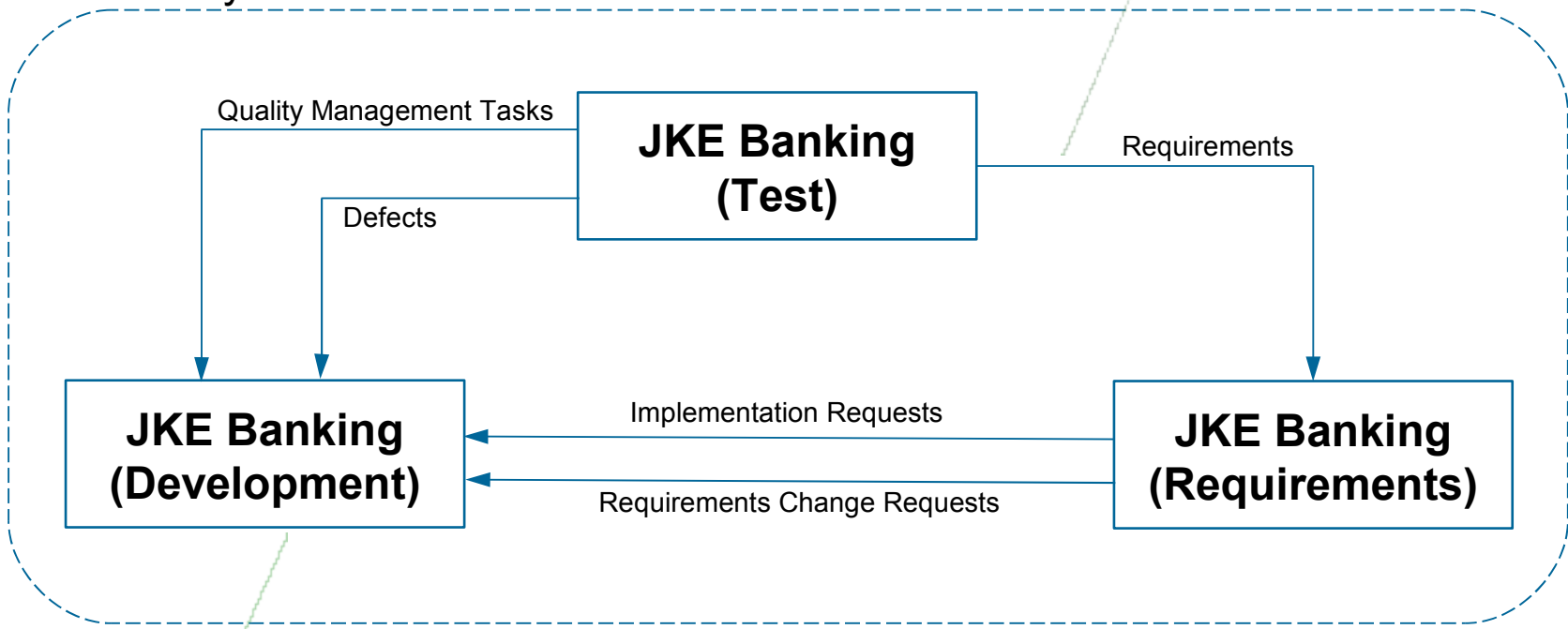
Artifact Container

Lifecycle Project

- A set of associated artifact containers
  - ▶ Artifact container types correspond to OSLC domains
  - ▶ Association reflect service relationships
  - ▶ Artifact containers are implemented by Project Areas

- A consolidated set of members and their roles
  - ▶ Artifact containers have members
  - ▶ Artifact containers have the notion of roles assignments
  - ▶ Members have container specific roles

Lifecycle Project Administration - LPA

- Manage Lifecycle Project Templates

- Manage Lifecycle Projects

- Manage Lifecycle Project Members and their role assignments

- Validate role assignment rules

- Get you started with the Money That Matters Sample Project

System Architecture

- Applications register with the Jazz Team Server

- Applications employ common services such as User and License Management, and Lifecycle Project Administration
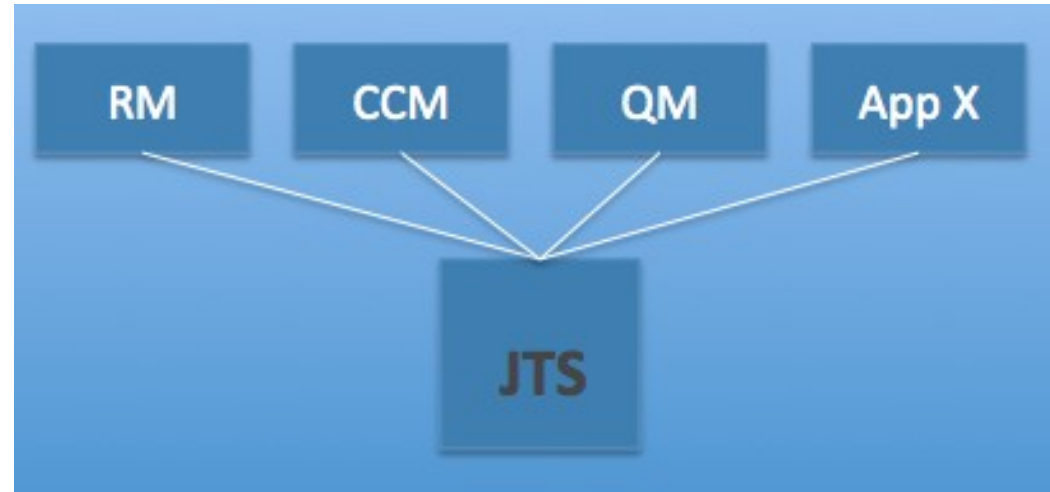
- JTS and its registered applications define a container for lifecycle projects

- LPA ensures secure communication between the applications

- (LPA is one application, but conceptually belongs to the JTS)

Challenges Addressed?

- ☑ Choose and link applications (by virtue of architecture)
- ☑ unify user accounts (by virtue of architecture)
- ☑ provide Single-Sign-On (simplified but not automatic)
- ☑ Choose collaboration model
- ☑ Select a set of matching process and project templates
- ☑ Create project areas
- ☑ Create appropriate project area associations
- ☑ Manage project area membership
- ☑ Coordinate role assignment across project areas
- ☑ A Product Owner should be able to author requirements
- ☑ Assign licenses
- ☐ Ensure matching license assignment

- ☑ What term / phrase should we use to refer to these?

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Setup

Money That Matters Sample Project

Rational Jazz Team Server (clmwb:9443/jts)

Lifecycle Project Administration

Projects   Members   Templates   Sample

Welcome to the **Money that Matters** sample ?

Create sample project

This sample provides an in-flight perspective of the collaborations that occur on a typical Agile team. Walk through an iteration with the team as they deliver a new feature to support an important corporate initiative called Money that Matters. To learn more about the Money that Matters sample, check out the 'Find out more' section.

Please select the applications to install the sample in:

☑ 🔲 /qm (https://clmwb:9443/qm)

☑ 🌐 /ccm (https://clmwb:9443/ccm)

☑ 🔺 /rm (https://clmwb:9443/rm)

Important: We strongly recommend that you deploy the sample project to a test server or your local host, not a production server.

For successful creation of the sample, your user account will need client access licenses for each of the applications you selected to be part of the sample. If you have not assigned these licenses, or are unsure, visit the Jazz Team Server Admistration > Users > Client Access License Management page to verify or make changes.

Note that it will take some time to create the sample and you will not be able to cancel the creation process once it starts.

(Create)

Returning to LPA

Lifecycle Projects

Members

Lifecycle Project Members ⑦

👤 Add Member | 🔄 (Save)

The members page provides an easy way to manage the members of a Lifecycle Project. From this page, you can add or remove members and manage the process roles assigned to a member in each artifact container.

Select Project: [Money that Matters Sample ▼]

[50 ▼] Items Per Page   ◁ Previous | **1 - 12** of **12** | Next ▷   [Type to filter]

Name	User ID	CCM	QM	RM	Status	Actions
Al	al	✓	✓	✓	Ok	
Bob	bob	✓	✓	✓	Ok	
Build	build	✓			Ok	
Curtis	curtis			✓	Ok	👤 👥 ✕
Deb	deb	✓		✓	Ok	
km	km	✓	✓	✓	Ok	
Marco	marco	✓	✓	✓	Ok	
Rebecca	rebecca	✓			Ok	

Member Roles

Name	User ID	CCM	QM	RM	Status	Actions
Al	al	✓	✓	✓	Ok	
Bob	bob	✓	✓	✓	Ok	

bob Member Details

To edit a member's process roles, click the process roles icon in the "Actions" column. For more advanced changes, click on the artifact container link or use the "Edit Artifact Container" action icon under the "Actions" column to open the full artifact container editor.

Artifact Container	Application	Membership	Read Access	Process Roles	Actions
JKE Banking (Change Management)	Change and Configuration Management	✓	✓	Product Owner	
JKE Banking (Quality Management)	Quality Management	✓	✓	Test Team Member	
JKE Banking (Requirements)	Requirements Management	✓	✓	Author	

LPA Pitfalls

- LPA only manages artifact container links on lifecycle project creation, not when a container is added post creation

- LPA adds members only to all artifact containers, not selectively

ROLE ASSIGNMENT RULES

Role Assignment Rules

- Role rules express roles that go across artifact containers

- Role R1 in Artifact Container C1 implies Role R2 in Artifact Container C2

Phone

Description:	Creating the Phone switcher infrastructure.

Members:	Show project members...
Recommended Role Assignments:	Download	Update

Artifact Containers

Configured Artifact Containers
Name

User ID	CCM	QM	RM	Status
al	✓	✓	✓	Ok
bob	✓	✓	⊗	The user requires the "Author" role See Member Details for more information.
curtis	✓	✓	✓	Ok

Syntax

```xml
<?xml version="1.0" encoding="UTF-8"?>

<configuration xmlns="http://jazz.net/xmlns/foundation/lpa/1.0/">

    <context container="https://clmwb:9443/ccm/process/project-areas/_Rjdm8ErvEeCCp7ZY0-dXFw" id="rtc.project"/>

    <context container="https://clmwb:9443/jts/process/project-areas/_QY0YwkrvEeCugMPganAUxA" id="rrc.project"/>

    <context container="https://clmwb:9443/qm/process/project-areas/_XnHLcErvEeCZ69b0OAP3Yw" id="rqm.project"/>

    <roleRule>

        <sourceRole context="#rtc.project" id="ScrumMaster"/>

        <targetRole context="#rqm.project" id="tester"/>

        <targetRole context="#rrc.project" id="Administrator"/>

    </roleRule>

    <roleRule>

        <sourceRole context="#rtc.project" id="Product Owner"/>

        <targetRole context="#rrc.project" id="Author"/>

        <targetRole context="#rqm.project" id="contributor"/>

    </roleRule>

</configuration>
```

LiveCycle Project Templates

Out-of-the Box Templates

Rational Jazz Team Server (clmwb:9443/jts)

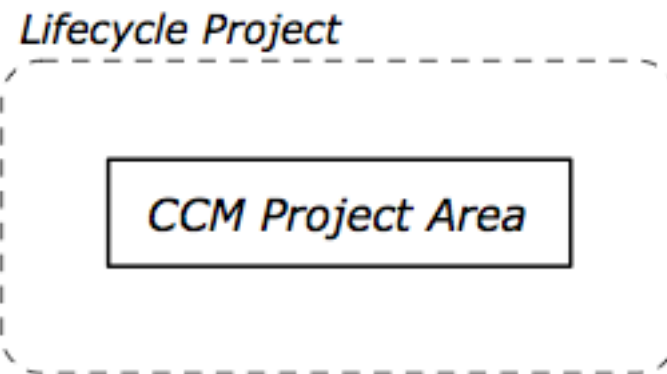## Lifecycle Project Administration

Projects Members **Templates** Sample

All Lifecycle Project Templates ?

Name
Quality Professional, Analyst, Developer
Quality Professional, Developer - without Requirements
Quality Professional, Analyst
Analyst, Developer
Analyst
Quality Professional - without Defects and Requirements
Developer
Quality Professional, Analyst, Developer - with separate Quality Management Tasks and Requirements Change Requests

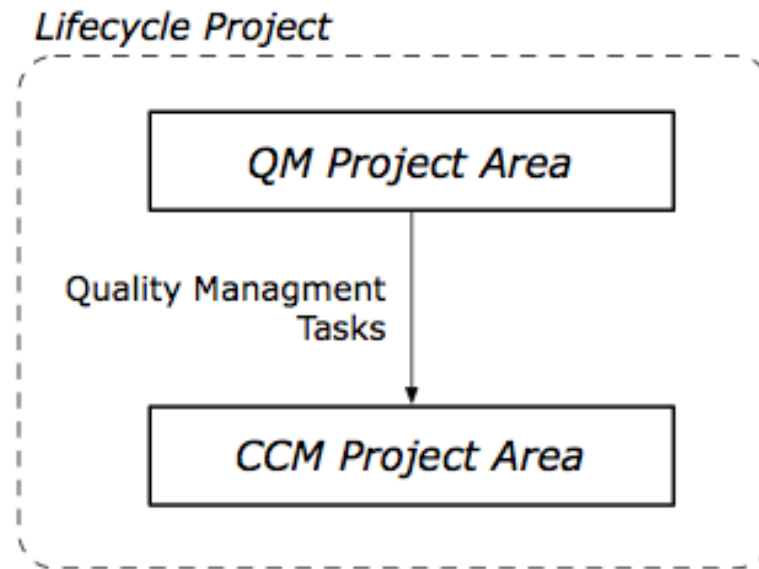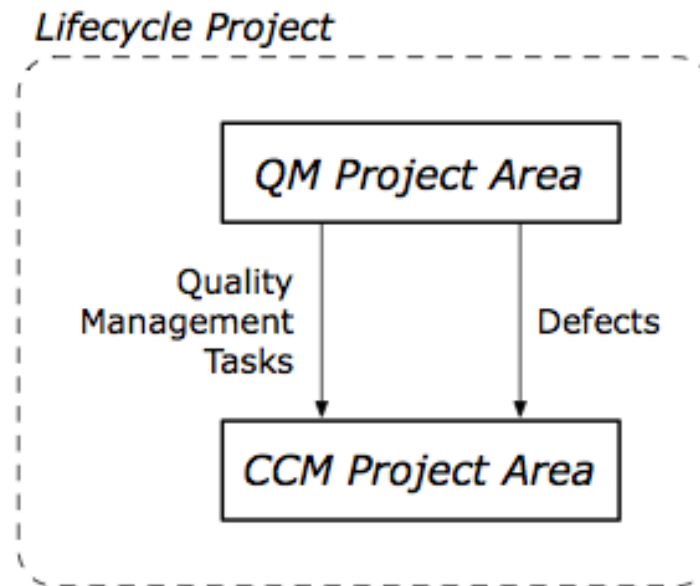- Each template defines a different collaboration model / topology

Developer
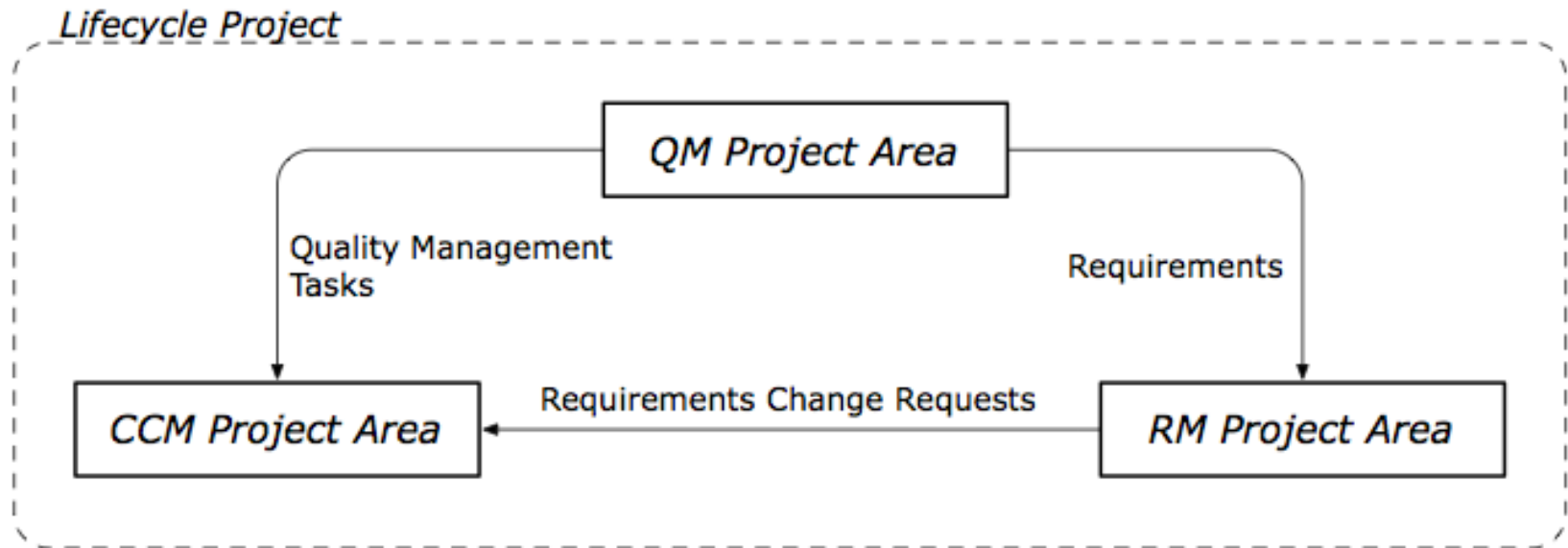

Lifecycle Project

CCM Project Area
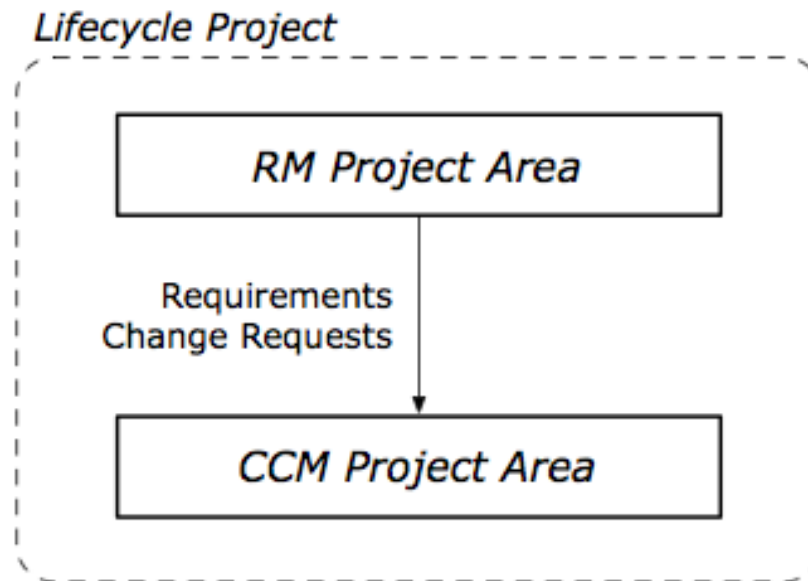
Analyst

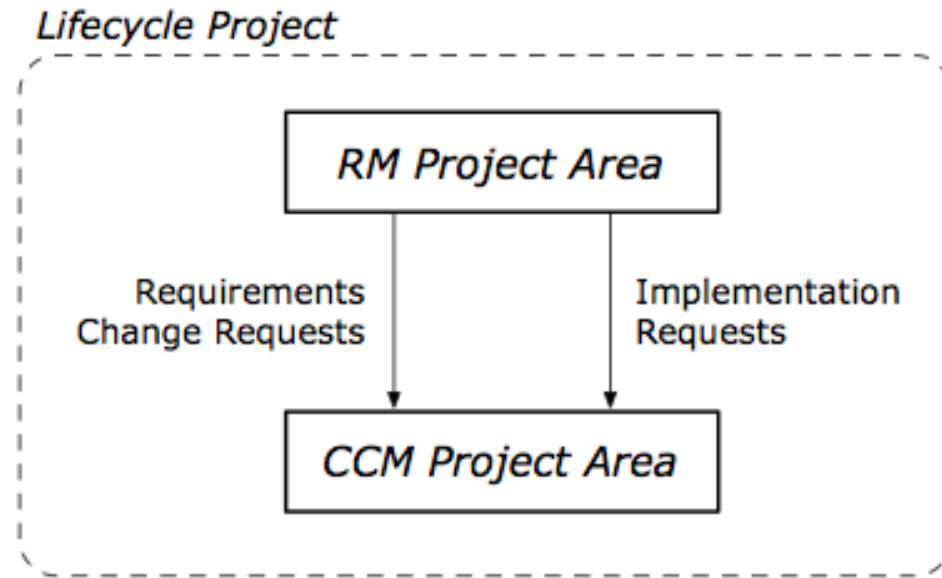# Quality Professional – without Defects and Requirements

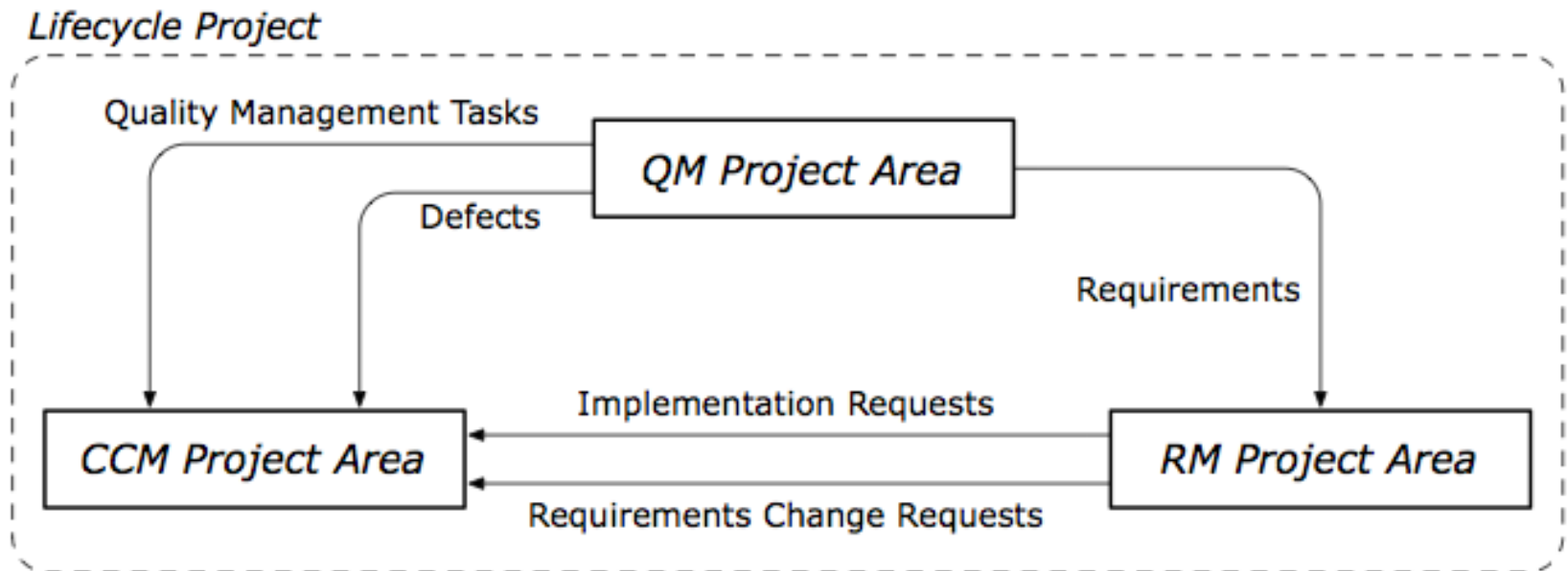# Quality Professional, Developer – without Requirements
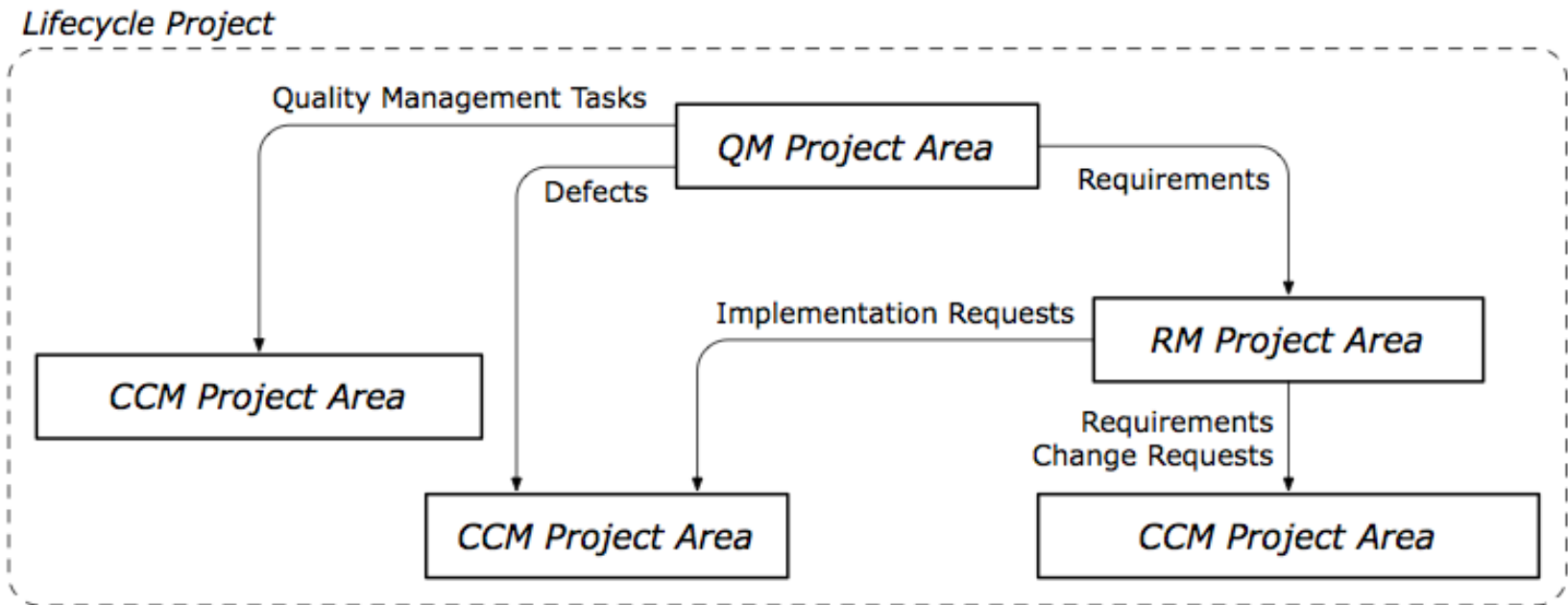
Quality Professional, Analyst

Analyst, Developer

Quality Professional, Analyst, Developer

Quality Professional, Analyst, Developer – with separate Quality Management Tasks and Requirement Change Requests

No Template

Lifecycle Project

Manage Templates

Syntax - Description

```xml
<!-- Template Description -->
<description>
    <dc:identifier>rational.alm.integrated.template</dc:identifier>
    <dc:title>Quality Professional, Analyst, Developer</dc:title>
    <dc:description>This template sets up…..</dc:description>
    <dc:creator>IBM Corp.</dc:creator>
    <locales>
        <locale>zh</locale>
        <locale>cs</locale>
        <locale>en_US</locale>
        <locale>fr</locale>
        <locale>de</locale>
    </locales>
</description>
```

Syntax – Project Areas

```
<projectArea id="rtc.project">
    <processTemplates>
        <processTemplate>
            <dc:identifier>scrum2.process.ibm.com</dc:identifier>
            <dc:title>Scrum</dc:title>
        </processTemplate>
        <processTemplate>
            <dc:identifier>formalpm.process.ibm.com</dc:identifier>
            <dc:title>Formal Project Management Process</dc:title>
        </processTemplate>
    </processTemplates>
    <dc:subject>Change Management</dc:subject>
    <domain ref="http://open-services.net/ns/cm#"/>
</projectArea>
```

Syntax - Associations

```xml
<!-- RRC implemented-by RTC -->
<projectAreaAssociation>
    <sourceDomain ref="#rrc.project"/>
    <linkType>implemented-by</linkType>
    <targetDomain ref="#rtc.project"/>
</projectAreaAssociation>

<!-- RTC implements RRC -->
<projectAreaAssociation>
    <sourceDomain ref="#rtc.project"/>
    <linkType>implements</linkType>
    <targetDomain ref="#rrc.project"/>
</projectAreaAssociation>
```

Syntax – Lifecycle Project

```xml
<lifeCycleProjects>
  <lifeCycleProject id="lpa.project">
    <dc:title>${request.param.projectName}</dc:title>
    <dc:description>${request.param.lpaProjectDescription}</dc:description>
    <lifeCycleProjectContext ref="#rrc.project"/>
    <lifeCycleProjectContext ref="#rtc.project"/>
    <lifeCycleProjectContext ref="#rqm.project"/>
    <configuration>
      <roleRule>
        <sourceRole id="ScrumMaster" context="#rtc.project"/>
        <targetRole id="tester" context="#rqm.project"/>
        <targetRole id="Administrator" context="#rrc.project"/>
      </roleRule>
      <roleRule>
        <sourceRole id="Product Owner" context="#rtc.project"/>
        <targetRole id="contributor" context="#rqm.project"/>
        <targetRole id="Author" context="#rrc.project"/>
      </roleRule>
    </configuration>
  </lifeCycleProject>
</lifeCycleProjects>
```

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THANK YOU

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