

# Best Practices for customizing IBM Rational Team Concert

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*"As Presented by Kai-Uwe Maetzel and Jean-Michel Lemieux in innovate 2010 at Orlando".*

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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:
    - [http://www.ibm.com/developerworks/rational/library/08/0701\\_ellingsworth/](http://www.ibm.com/developerworks/rational/library/08/0701_ellingsworth/)



## What was done? - Summary

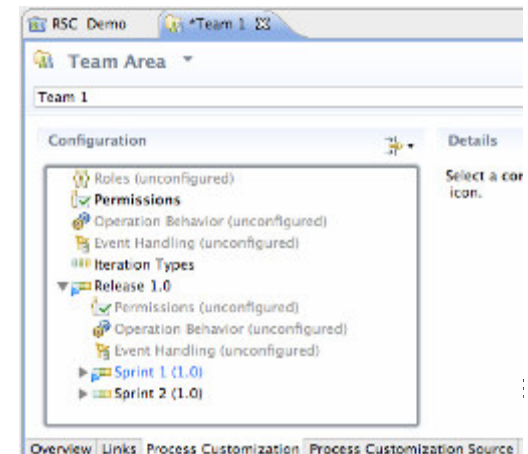
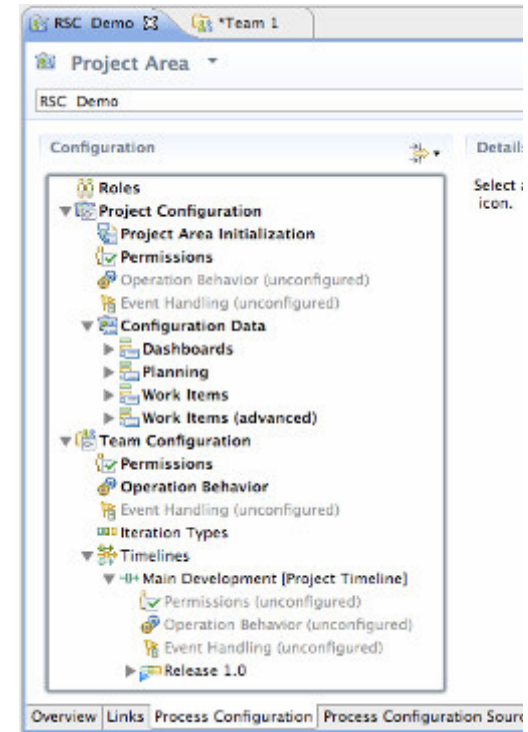
- New Work Item types:
  - ▶ some with additional **custom attributes**
  - ▶ some with **custom workflows**
  - ▶ new **layouts** for work item types
  - ▶ new **shared queries**
- Tighter Permissions
  - ▶ based on Scrum specific roles
- Required attributes
  - ▶ state specific: Work Item can only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





## 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*



## Process Customization: Operations

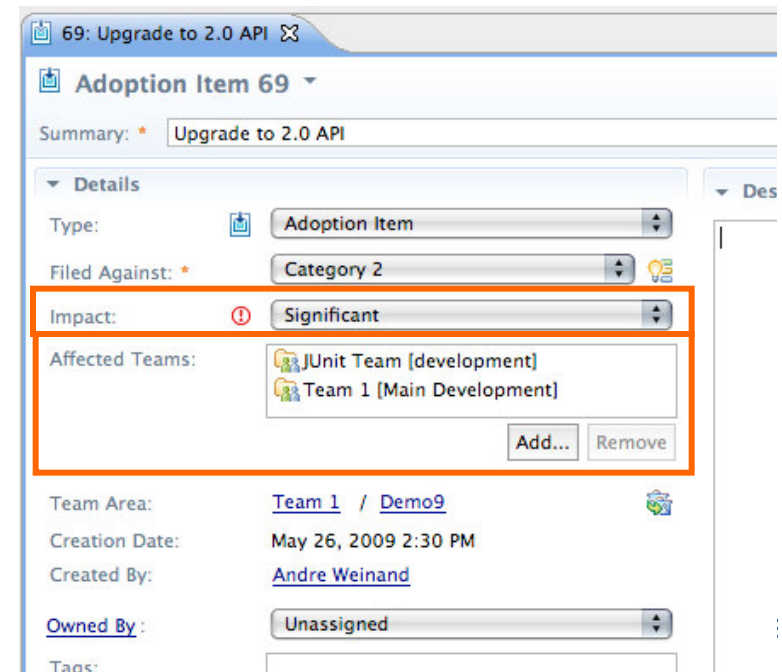
- **Example:**
  - ▶ “Save Project Dashboard”: project level
  - ▶ “Save Work Item”: team level
  
- **Operation Permissions:**
  - ▶ Based on finer grained “actions”:
    - **Create** Work Item
    - **Modify** Work Item
    - **Modify Attribute “Priority”** of Work Item
  
- **Operation Behavior:**
  - ▶ *Preconditions*, e.g. “Required Properties”
  - ▶ *Follow-up actions*, e.g. “Create Initial Work Items”





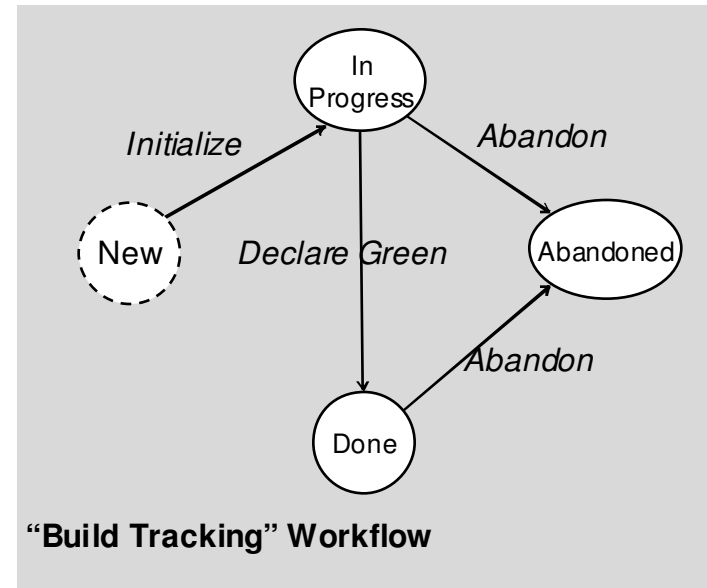
# Work Item Types & Custom Attributes

- **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



# 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 Bindings**

Associate work item types with editor presentations.

Choose the Work Item Type to edit:

Defect

Work Item Editor

com.ibm.team.workitem.editor.default

Inline Work Item Editor

com.ibm.team.workitem.web.inline.default

Lightweight Work Item Creation Dialog

com.ibm.team.workitem.lightweight.editor.section

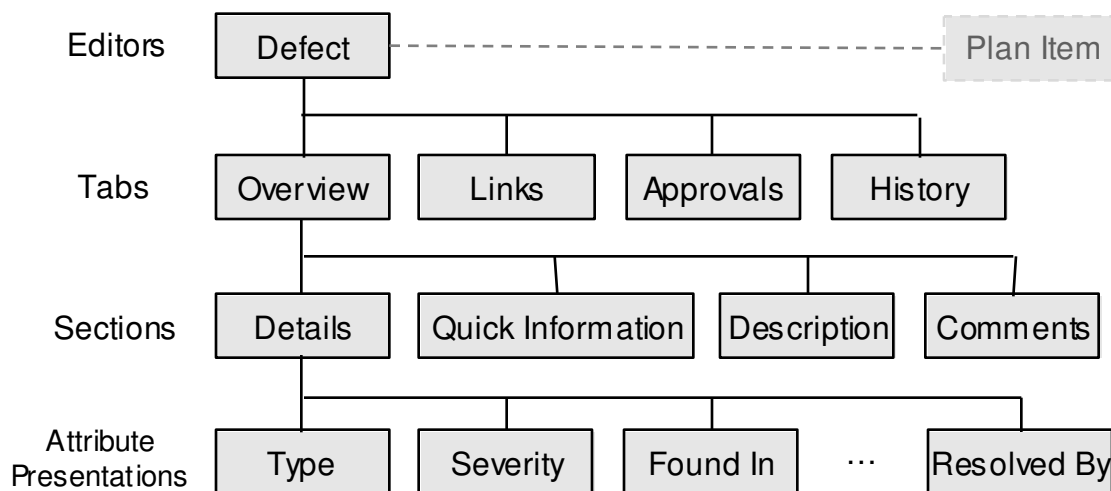
Plan Editor Preview

com.ibm.team.apt.planPreview.default

**Contexts**

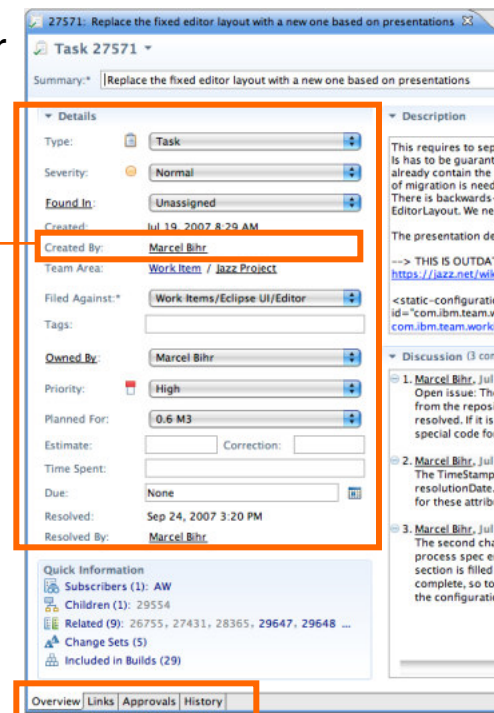
# Editor Presentation

- Editor's UI element hierarchy:



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

Editor Section Attribute



Tabs





# 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

The screenshot shows a web application window titled "27571: Replace the fixed editor layout with a new one based on presentations". The interface is divided into several sections, each with a distinct background pattern and a label:

- Details:** A form with fields for Name (Task), Severity (Normal), Found In (Unassigned), Created (Jul 19, 2007 8:23 AM), Created By (Marcel Bitt), Team Area (Work Item / Area Project), Filed Against (Work Items/Eclipse IR/Editor), Tags, Owned By (Marcel Bitt), Priority (High), Planned For (Q3 M3), Estimate (Correction), Time Spent, Due (None), Resolved (Sep 24, 2007 3:20 PM), and Resolved by (Marcel Bitt).
- Description:** A text area containing technical details about separating existing parts and process templates, mentioning backwards-compatibility code and a link to a design document.
- Discussion:** A list of three comments from Marcel Bitt, dated Jul 19, 2007, discussing contributor presentation in writable mode and special code for creationDate, dueDate, and resolutionDate.
- Quickinfo:** A summary of related items: Subscribers (1), Children (1), Related (9), Change Sets (5), and Included in Builds (29).

At the bottom, there are navigation tabs for Overview, Links, Approvals, and History.





# Questions



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