

IBM® Rational® Quality Manager in a Globally Distributed World

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IBM® Rational® Quality Manager in a Globally Distributed World - QM12



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Abbreviations

- System and Integration Verification Test (SVT)
- IBM® Rational® Quality Manager (RQM)



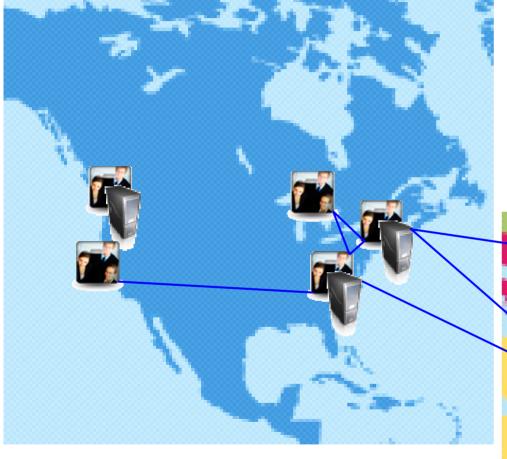
Agenda

- Case Study: IBM® Rational® SVT's Global Deployment of RQM
- Deployment Recommendations for Distributed Teams
- Tips for Tweaking User Response
- RQM Features Leveraged for Global Teams
 - Access and Administration
 - Thin Web-Based Client
 - Centralized Administration
 - Communication and Collaboration
 - Work Items
 - Duplicate Defect Detection
 - Templates
 - Related Sites
 - Risk Assessment





IBM® Rational® SVT's Global Deployment of RQM



- 180+ Users
- 4 countries
- 7 locations, 8 sites
- 10 servers
- 16 products
- 2000+ Assets





IBM® Rational® SVT's Global Deployment of RQM



Intentionally Heterogeneous

- Mixed Teams (Development, Test, User Assistance)
- Single and Multi-Project Servers
- Remote Users
- VPN Users
- Different Test Focuses (Performance, Integration, Benchmarking, etc.)
 Becoming Homogenous

Migrated Data

 ClearQuest Test Management (CQTM), Rational Manual Tester, Excel, Notes Based

Highly Integrated

 Rational Build Forge, Rational Requisite Pro, Rational Team Concert, Rational ClearQuest

Test Tooling

 Rational Functional Tester, Rational Performance Tester, homegrown tools





Global Questions, RQM Answers

- How should I deploy RQM if I have a(n)...
 - ...small remote team?
 - …large remote team?
 - ...outsourced remote team?
- How do I ensure that my remote user have good client responsiveness?

Answer: Design deployment based on bandwidth need and tweak user response.





Recommended Topologies – Assumptions

It is all about the pipe: bandwidth and latency



Bandwidth greater than 1.5Mbps



Latency less than 250ms





Recommended Topologies – Assumptions

Four factors matter most:

- Number of Active Users
- Number of Assets
- Size of Assets
- Organization of Assets

Assuming average asset size and asset counts linear with team size, recommended bandwidth based on experience (not measured performance) for RQM 1.0.1*:

Bandwidth	Number of Active Users
1.5Mbps	10
3Mbps	50
10Mbps	100
100Mbps	250

*Your mileage may vary.

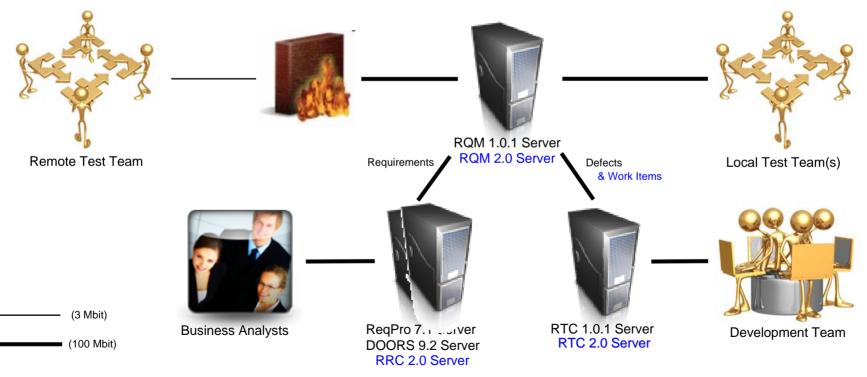
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6.	Romania	10.75 Mb/s	6. Russian Fe	ederation	4.24 Mb/
5.	Lithuania	11.67 Mb/s	5. Romania		4.43 Mb/
4.	Sweden	12.00 Mb/s	4. Bulgaria		4.70 Mb/
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Recommended Topologies – Small Remote Team

Criteria (RQM 1.0.1):

- Large local team (between 100-200 users)
- Small remote team (less than 50 users)
- Less than 5,000 total assets.
- Shared projects, work items, and defects



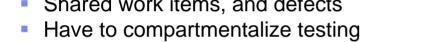
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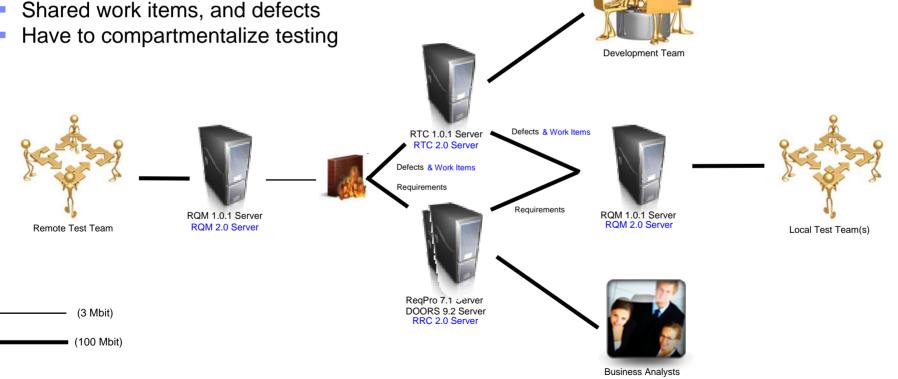


Recommended Topologies – Large Remote Team

Criteria (RQM 1.0.1):

- Large local team (between 100-150 users)
- Large remote team (between 100-150 users)
- More than 5,000 total assets.
- Shared work items, and defects







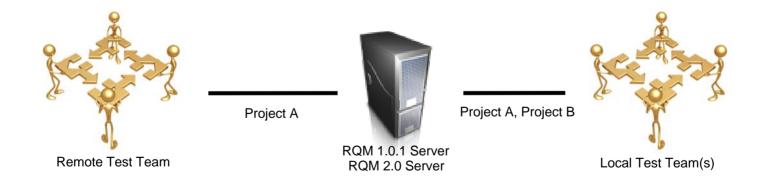
Recommended Topologies – Outsourced Team

Criteria

- Need to monitor remote team's progress
- Limit visibility of projects to local teams
- Restrict actions of remote team.
- Teams can be varied in size

Recommendation:

- Apply remote team size recommendation
- Use multiple projects for isolation
 - Remote test team has project that local test users can access and monitor.
 - Local users have own isolated project.
- Leverage action based permissions







Remote Users – Tweaking User Response

RQM 1.0.1 – Asset Throttling

- Enables linear response for increasing data loads. Limits what you see in list views.
- In the Global task bar, Admin \rightarrow System Properties. Select Artifact Options.

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Remote Users – Tweaking User Response

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Notated Sites	Beijing, China	Tony	
	Raleigh, NC	Peter Sun	

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...to reduce traffic to clients of each geography.

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E 5 00000	\diamond	RQM - RTC Co-Existance	Approved	Raleigh, NC	2200	10 minute
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E 7 00000	\diamond	RQM Availability (14 Day)	Under Review	Beijing, China	740	4 minutes
E 8 00000	\diamond	RQM Availability (21 Day)	Under Review	Beijing, China	990	4 minutes
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RQM 2.0 – New Views and Performance Optimizations

- Dynamic loading Tree and Explorer Views.
- Allows filtering by test plan on top of throttling and View Builder.

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Global Questions, RQM Answers

- How do I enable teams to test anywhere while keeping administration centralized?
- How can I eliminate the need to have administrators at each site?
- How do I control what each team is capable of doing?

Answer: RQM's thin web-based client and web-based administration.





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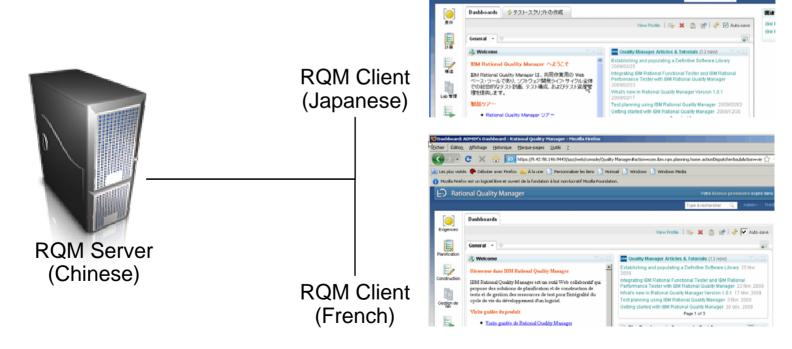
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Dashboard: ADMIN's Dashboar... E

Thin Web-Based Client

RQM's thin client is perfect for global teams who...

- ...need localized clients for major languages.
- ...want to have robust testing capability everywhere without having to administer a quality management solution everywhere.





Centralized Web-Based Administration

RQM's centralized administrative capabilities allow administrators of globally distributed teams to...

- ...have centralized set of user controls for multiple projects.
 - Allows quick project switching on the same server



- ...have one user database for multiple servers using LDAP.
 - Allows different RQM instances to have single user administration.
 - Combined with quick project switching, one username and one password gives access to all
 - Look in Admin →Jazz Server Administration → Advanced Properties





Centralized Web-Based Administration

- ...have web access to nearly all RQM administrative functions.
 - Connector configuration now built into web administration functions

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non			SSL enabled on ClearQuest Web remote server	false	false

- Project and user administration fully available from the web.
- Only functions that require the Eclipse client is customization of asset forms.



Centralized Administration

...control permissions at project, role, user and action levels.

- Lots of flexibility for permissions.
- Users requiring full isolation should use separate project levels.
- From Admin → Jazz Project Administration

Quality Manager	Active Project Areas >	Configuration: Team
Overview Roles Permissions Access Control	🕮 [*] Quality Manager	Roles:
Details Preview	Overview Roles Permissions Access Control	Everyone (default)
Timeline: [unknown to unknown] Edit Summary: [Quality Manager	Roles	tester
Description:	Each project area and each team area can define a set of roles. The defined roles are visible in the area where they're declared and in all child areas. Roles defined in the project area can be assigned to users for the whole project area or they can be assigned in any team area. Roles defined in a team area can similarly be assigned in that team or in any child team. The ordering of roles in this section determines how they will be ordered in other sections of the editor, but it does not affect the process runtime.	Permitted Actions: Create Self-Service Reservations Perform Discovery Run and cancel discovery Save Automations
Quality Manager Default Process	Defined Roles 🔑 🔐 🙀 Role Details	E Planning
The default process for Rational Quality Manager.	architect testlead tester	 Delete Plan Delete Plan Save Plan
Members Add	testmanager architect	Save Plan
Roles determine a user's permissions as well as any preconditions and follow-up actions that are run for project and team operations. The roles assignments below are also valid in all the project's team areas. Unless configured otherwise, all users in the repository play the 'default' role.		
Name Process Roles		Final (ignore customization of this operation in child team
Abner Jonassaint tester		areas)
Anne Burke testlead		Explanation to show when permission denied:
Babu Suresh architect		
Justin J. Kutticherry tester		
Peter Sun testmanager	Y	Work item configuration data is used to configure advanced aspects of work items for this project.

IBM® Rational® Quality Manager in a Globally Distributed World – QM12

Quality Manager



Global Questions, RQM Answers

- Since my test teams are in different time zones, how can I leverage RQM to coordinate testing?
- How can I enforce test processes and policies across global teams without a lot of late night meetings and a flood of emails?
- How can people with diverse perspectives assess the importance of the testing we develop?

Answer: RQM's Communication and Collaboration Features





Work Items

Work items are the lifeblood of distributed teams.

- Use work items to break up large test tasks into manageable parts to be given to different users.
 - Summary task owner owns test case.
 - Sections are assigned to others.

ashboards View Te	st Cases 🗎 MT_Execution
Manage Sections	MT_Execution Image: Constraint of the second s
tequirements tisk Assessment	Summary Tester, Overall Owner Use the theme, category and function features to group your test cases along related items or logical groupings. Weight is a measure of execution effort and can be base on tester hours, units of work, or priority.
est Execution Records ttachments	Test Case Design Test Architect Work Item: Create Define the overall design for the current test case. This can in setup information or topologies.
	Formal Review Work Item: Create List the people who will be reviewers and approvers of this content and define your approval process.
	Requirements Business Analyst Work Item: Create This section lists all of the content and requirements associated with a given test case. You can select existing requirements or define new items and this highlights the traceability of requirements to tests.
	Risk Assessment This section lists all of the content and risks associated with a given test case. In ris assessment, you can add mitigation actions or re-calculate the can reset the risk ranking and add your comments.
	Pre-Condition Work Item: Create
	Defines the items that must occur before you can begin executing this test case. For example, another test case might have to complete before you can begin this particular test case.





Work Items

- Use work items to hand off work to teams in different time zones.
 - Allows more complex testing
 - Great for performance testing
 - Builds awareness and skills globally

Hand off Process

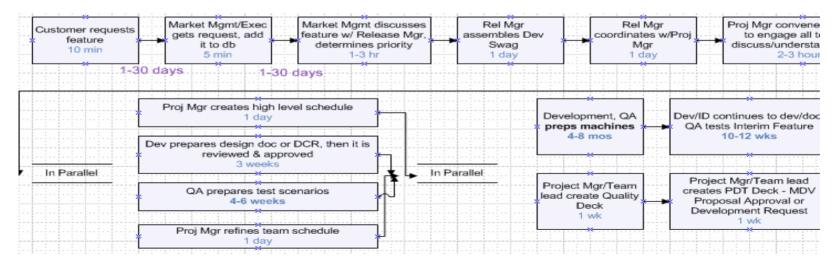
- 1. A work item is created for all work.
- 2. When possible, work is associated to a test artifact in RQM to provide context.
- 3. At the end of the shift, if work is incomplete. The work item can be assigned to someone in another geography and shift.
- 4. Leverage dashboards, reports to find available cycles.
- 5. Repeat until the work item is resolved.

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Owned By:	Complete the Test Case De Babu Suresh	•	t Case: MT_Ex
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Did not have time	to finish, can you complete fo	or me Justin - <mark>Sure</mark> :	sh.
	Due: Task-Qua Summary: Com Overview Li Details Type: [Creation Date: Created By: Project Area: Team Area: Filed Against: Tags: Description Complete the Test Discussion No Comments.	Due: Jun 4, 2009 Work Item: ⇒ Task-Quality 23 * Summary: Complete the Test Case Det ⇒ Overview Links Approvals Hist Details Type: Task-Quality ▼ Creation Date: May 31, 2009 5:52 A.M. Created By: Peter Sun Project Area: Quality Manager Team Filed Against: Quality Manager Team ♥ Tags: ♥ ♥ Description Complete the Test Case Design Section of Test Discussion No Comments.	Due: Jun 4, 2009 Work Item: ⇒ 23 (Babu Suresh Image: Summary: Complete the Test Case De: Resolved Overview Links Approvals History Details Image: Summary: Owned By: Creation Date: May 31, 2009 5:52 A.M. Estimate: Created By: Peter Sun Due Date: Project Area: Quality Manager Resolution Date: Tags: Image: Summary: Quality Manager Resolution Date: Description Complete the Test Case Design Section of Test Case: MT_Execut Discussion

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Work Items

- Use work items to improve and measure test efficiency.
 - Leverage work item fields to capture efficiency data.
 - State history
 - Estimate
 - Due Date
 - Correction
 - Time Spent
 - Apply Value Stream Mapping technique to work item data to identify inefficiencies.
 - New exercise but leading to interesting discussions already.







Global test teams have higher rates of defect duplication. Duplicate defect detection cuts down the cost of managing duplicate defects.

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Your Trial License expires in 61 days | Peter Sun | Log Out |

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Quality Manager



Related Defects panel appears for the following views:

Rational Quality Manager

- View Test Execution Records
- Script Execution
- Execution Results
- Defect h link to Exec

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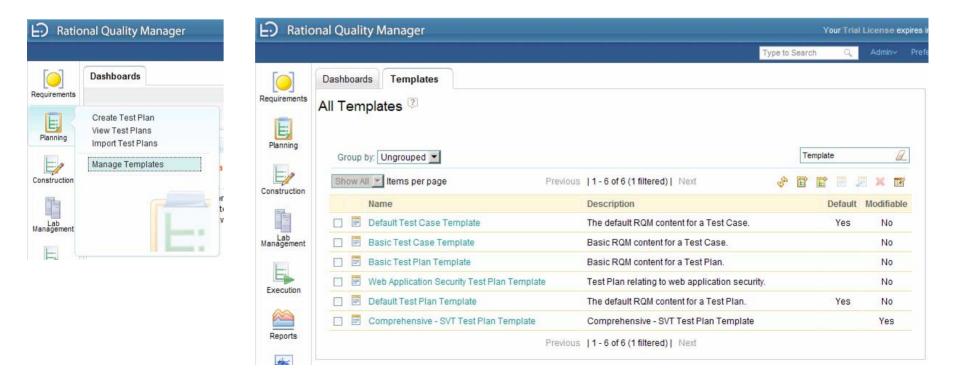
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Summary: * RMT Migration is broken Overview Links Approvals History Attachments Add File: Browse	Test Management Test Milestone: Test Case: Start Time: May 30, 2009 1:28:00 Test Case: Export test assets End Time: May 30, 2009 1:28:00 Test Case: Export test assets End Time: May 30, 2009 1:28:00 Test Script: Total Run Time: 0 sec Test Data: Unassigned Build Unassigned Weight: 100	Trocess. Consumability restricce
No Attachments. Links Add: Related Execution Results: RMT Migration	Reports Weight Distribution ? Pass > 86 Fail > 14 Inconclusive > 0 Blocked > 0 Attempted > 100	

Templates

Templates provide a foundation for coordination.

- Templates are an easy way to create enforceable test process
- Templates provide a framework for review.





Templates

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Templates provide a platform to give instructions in context.

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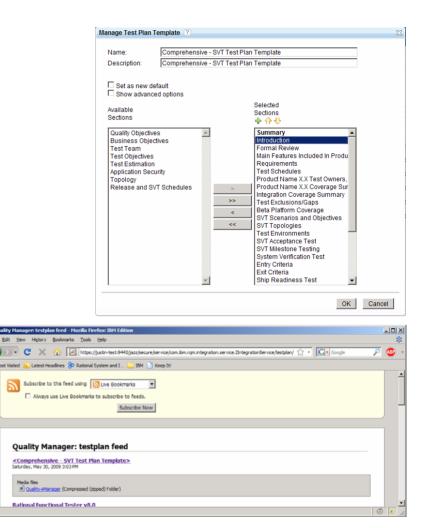
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Templates

Enhancing the built-in mechanism:

- 1. Create a template with desired content.
- 2. Create a Test Plan or Test Case with that template and name it a template.
- 3. Fill in the sections with guidance and direction.
- 4. Save asset.
- 5. When a new asset is needed, export the XML using the feed mechanism.
 - https://<hostname>:9443/jazz/secure/service/com.ibm .rqm.integration.service.IIntegrationService/testplan/
 - https://<hostname>:9443/jazz/secure/service/com.ibm .rqm.integration.service.IIntegrationService/testcase/
- 6. Import as new asset and edit

Note: There is currently a 512K limit on imported assets.



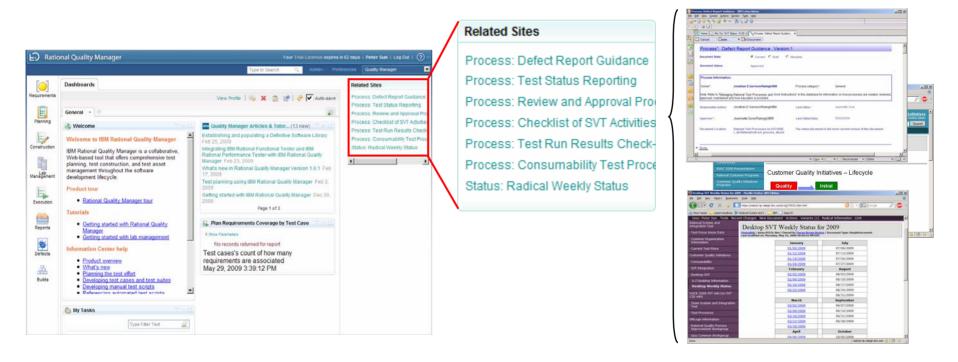


Related Sites

. .

Related sites put need to know information at the forefront.

- Related sites are a great way to centralize and distribute information.
- Related sites prevent processes and best practices from being hidden and ignored.







Related Sites

Configuring:

- In the Global task bar, Admin → System Properties
- 2. Administration tab will appear as a new document.
- 3. Select "Related Sites" in the list of administration activities.
- 4. You can add, delete or change the order.
- 5. Click Save to save the changes.
- 6. Refresh the browser to have the sites appear.

Dashboards System Properties	
Administration	Discard Changes Save
Artifact Options Build Provider RequisitePro Host Properties Shared Resource Locations Report Properties Custom Reporting Host Properties	Configure RQM's list of Related Sites Type Filter Text
Global CPU Limitation Artifact State Transition Constraints Execution States Test Plan Categories Test Case Categories Customize Catalog Execution Preferences	Show All 💌 Items per page Previous 1-7 of 7 Next 🕂
Manual script dictionary Related Sites	# Name URL
Risk Profiles	1 Process: Defect Reg Notes://ATE10DB/852572D7004F1
	2 Process: Test Statu: Notes://ATE10DB/852572D7004F1
	3 Process: Review an Notes://ATE10DB/852572D7004F1
	4 Process: Checklist Notes://ATE10DB/852572D7004F1
	5 Process: Test Run F Notes://ATE10DB/852572D7004F1
	6 Process: Consumal Notes://ATE10DB/852572D7004F1
	7 Status: Radical Wee https://radical.rtp.raleigh.ibm.com/s
	Previous 1-7 of 7 Next





Global teams often have different communication styles. RQM provides features like risk assessment.

- Risk assessments allow distributed teams to see a quantitative and qualitative view of a test plan or test case's importance.
- Risk assessments allow divergent stakeholders to express their quality concerns in a common language and metric.

is section lists the risks associate u can reset the risk ranking and ad Risk Assessment:	d comments.	ment, you can ado	d mitigation actions or re-calculate the risk. In My R
Show All 💌 Items per page	Previous 1-3	of3 Next	= / + ×
Risk Factor	Assessment	Importance	Mitigation Action
Insufficient test resources	Likelihood: Most Likely Cost: High	00000	Development will lend four people for four weeks
Insufficient test configurations	Likelihood: Likely Cost: High	00000	Borrowing AIX machines from GBS.
Tight schedule	Likelihood: Unlikely Cost: High	00000	
ry high: 0 (0%) gh: 1 (100%)	o⊗ high		
Community Risk: Avg: 0000	i⊗ high		



Summary

To be successful with RQM with Globally Distributed teams...

- Build a deployment topology that fits your company's network capabilities.
- Organize and design your test assets with global teams in mind.
- Structure projects and deploy projects to take advantage of RQM's security model.
- Build test processes, communicate them, and keep them visible.
 Processes do not need to be heavy.
- Leverage the collaborative feature of RQM like work items, risk assessment, defect duplication detection, templates, etc.











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