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Lab DSE-5078

**Designing a Configuration Aware Reporting Solution
for Product Line Engineering**

February 2015



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Overview

This lab demonstrates how the IBM solutions for Reporting and Analytics can help customers applying DevOps and Continuous Engineering using the Collaborative Lifecycle Management and Systems and Software Engineering solutions.

In this lab you will get hands on experience with

- IBM Rational solutions for Reporting and Analytics
- IBM Rational Quality Manager
- IBM Rational DOORS Next Generation
- IBM Rational Configuration Management

You will also deepen your understanding in

- Configuration Management concepts
- Lifecycle artifacts and traceability
- Self-serve query and report creation
- Dashboards and report widgets
- Configuration aware reporting

Over the course of this lab, you will explore how the IBM Jazz Reporting Service supports Configuration Management to:

- Provide self service capability for Team members, Team leads and Administrators to create shared or private reports that support the product development lifecycle
- Access and display information about lifecycle artifacts and traceability links across the product development lifecycle
- Scope reports to the configurations used by the product development team
- Design personal or project dashboards with widgets that show reports

Lab Setup

This lab will use a Jazz server running various services for Configuration Management, Requirements Management, Quality Manager and Reporting within a VMware image. The Jazz server hosted on this image will be accessed through a web client to access needed applications and data, within the lab activities. Combining the server and the clients is not a normal configuration but is required to get all the resources needed for this lab into an easily portable image.

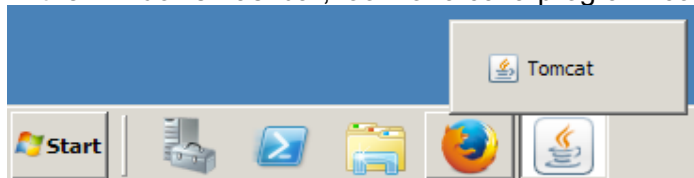
The VMWare image with the Jazz server should already been started by the lab staff.

As a first step in this lab you may optionally validate that the Jazz server is running on your machine.

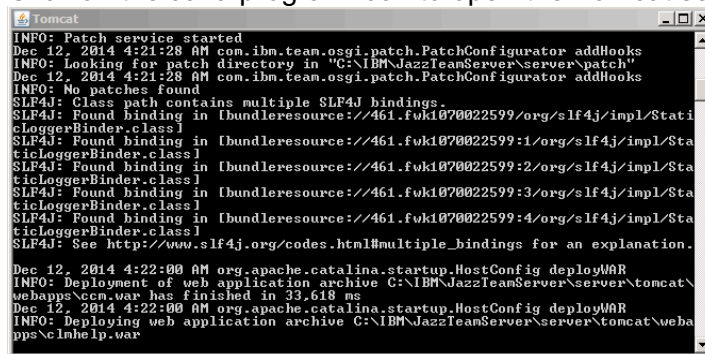
You may also proceed directly to next main section in the lab.

Validating that the Jazz server is running

1. Log into the Windows server
 - a. Press Ctrl-Alt-Del
 - b. Log in as
 - i. User: Administrator
 - ii. Password: Rati0nal
2. Check if the Tomcat server is running
 - a. In the Windows Taskbar, look for a Java program icon and a Tomcat server process.



- b. Click on the Java program icon to open the Tomcat server process.



- c. Confirm that the server is running.

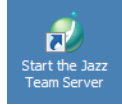
If the Tomcat server process is running, proceed to next main section in the lab.

If no Tomcat server process is running, proceed to the step below to 'Starting the server'

3. Starting the server

ONLY PERFORM THIS STEP IF THE JAZZ SERVER IS NOT STARTED

- a. On the desktop, double click on the **Start the Jazz Team Server** icon



- b. A command window titled **Tomcat** will open.
In 3-5 minutes you'll see the output, as shown above, with the "Server startup in ..." message.

Note: Be patient. Starting the servers is an operation that a real user never does. Users normally run continuously on a dedicated server environment managed by an administration team.

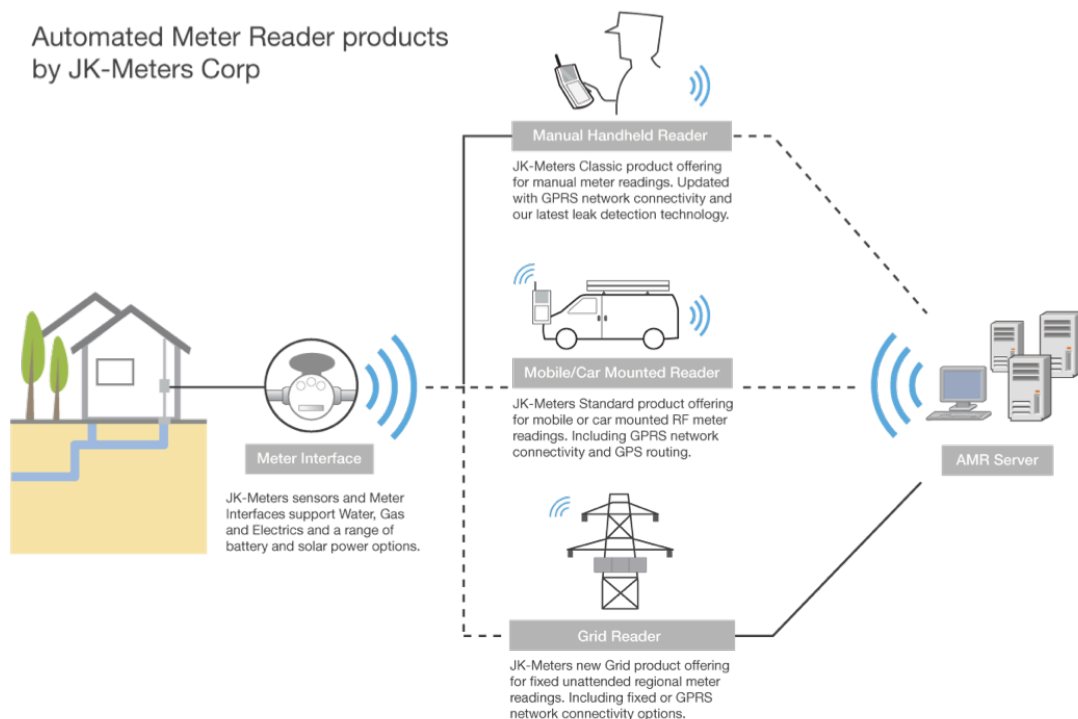
If in doubt on the state of the server, check with the lab staff before proceeding.

- c. Minimize the Tomcat server process window (DON'T click X!).

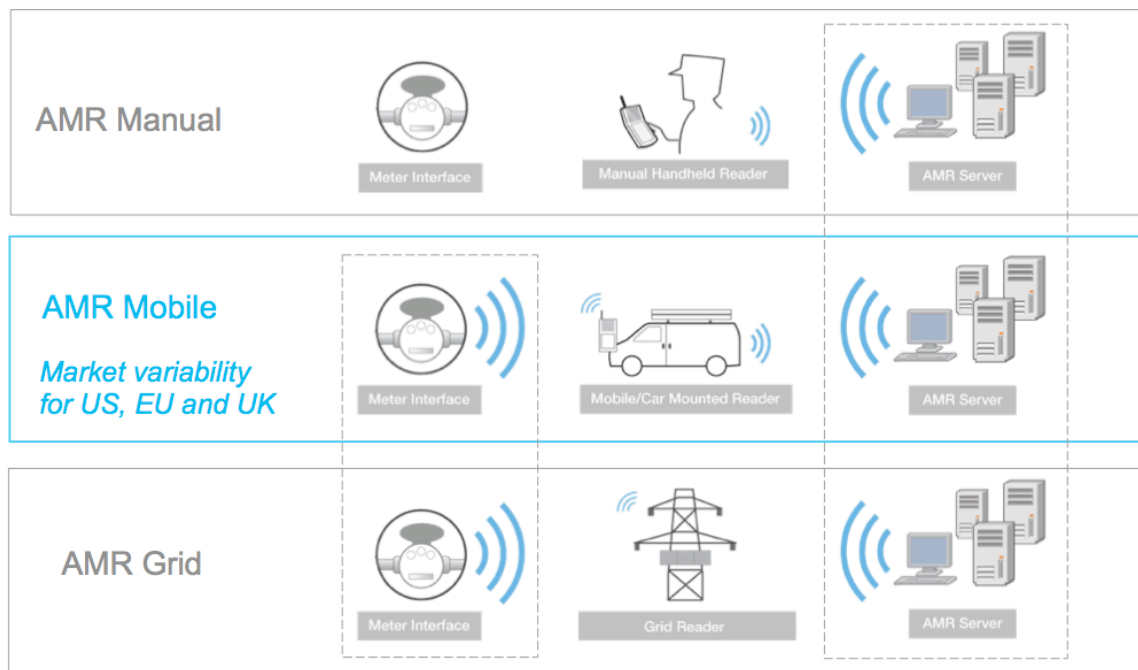
Introduction to Automated Meter Reader

This lab uses artifacts from the Automated Meter Reader sample data for reporting. The Automated Meter Reader sample uses a fictitious company JK Meters Corp, aspiring leaders of Smarter Flow Products for Utilities.

The Metering Division at JK Meters Corp has a range of Automated Meter Reader products in its product line. The most successful product is the Automated Meter Reader for Water Flow (see figure below). The product consists of meter interface units mounted on water pipes. The meter interface unit measures flow and delivers data to handheld or car mounted meter readers. The registered meter readings are uploaded from the handheld devices to the AMR server data management system manually. Uploading of data is performed continuously by the mobile meter readers using a mobile network connection, or manually when returning to the office at the end of the day when using the manual meter reader product. The Metering Division is currently investing in improved features in the product lines and new AMR products. An innovative new AMR Grid product reduces the operational cost of utility services by providing fixed grid meter readers that continuously reads a wireless grid of residential or industrial meter interface units and uploads data over a fixed network connection.



The Automated Meter Reader products are configured from reusable components. These component subsystems are developed and delivered by the Meter Reader, Meter Interface and AMR Server platform teams. The platform teams deliver the component subsystems with feature variability for the product line. For example, the Meter Interface team delivers wired and wireless variants of the component for the Manual and Mobile products. The Meter Reader team delivers variant components for Manual, Mobile and Grid products.



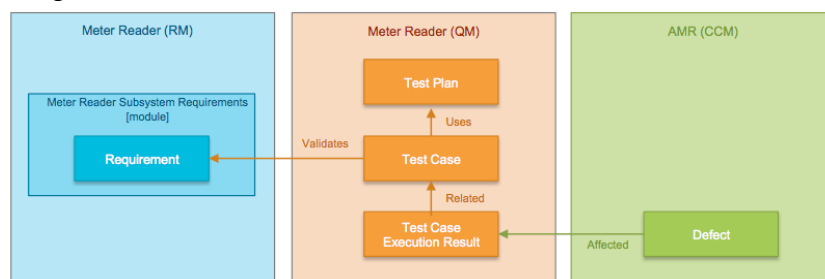
The Automated Meter Reader products have been delivered to utility customers in US. JK Meters Corp is growing its market share by developing variants for other regional markets. The variants are configured with regional requirements on power voltage, dimensions on pipe mounting, regional units of flow and volume, language configuration for the handheld meter readers and regional city maps for GPS routing.

In this lab you will explore how Pete, the Project Manager for the AMR Mobile products, is using the IBM Jazz Reporting Service to build queries that report on the test coverage and latest test results for the Mobile US and Mobile EU products under development. Pete will also share the reports with his team on the project team dashboard.

Introduction to Configuration Management Concepts

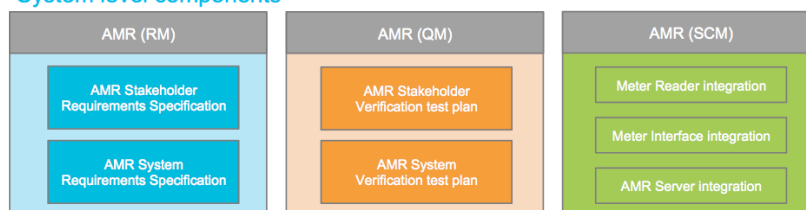
In this initial part of the lab we will introduce key concepts in configuration management, like *artifacts*, *components*, *streams* and *global configurations*.

The Automated Meter Reader (AMR) development teams are using the Systems and Software Engineering solution from IBM to manage the *system engineering artifacts* like requirements, tests, designs and source code. The artifacts are linked using traceability relationships. Examples of such links are shown in the figure below.

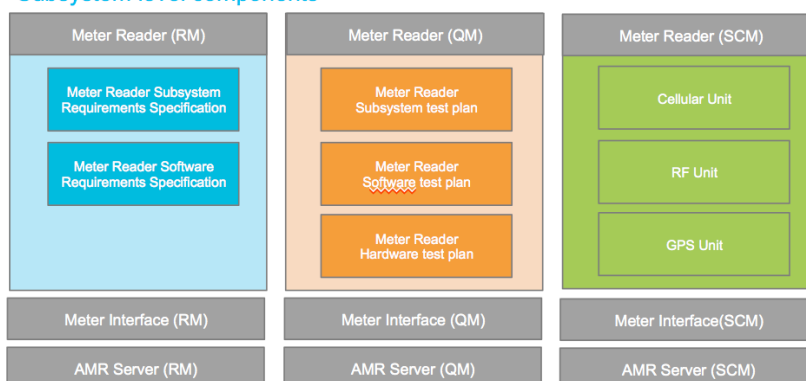


In blue we indicate requirements for the 'Meter Reader (RM)' component specified in a 'Meter Reader Subsystem Requirements' module. Each requirement may be linked to a Test Case in the 'Meter Reader (QM)' component. Related requirements and test cases are linked using *validates* links. Test Cases are linked to *using* Test Plans and the results of run tests are linked to *related* Test Case Execution Results. In case a test run fails a Defect may be linked using an *affected* link.

System level components



Subsystem level components

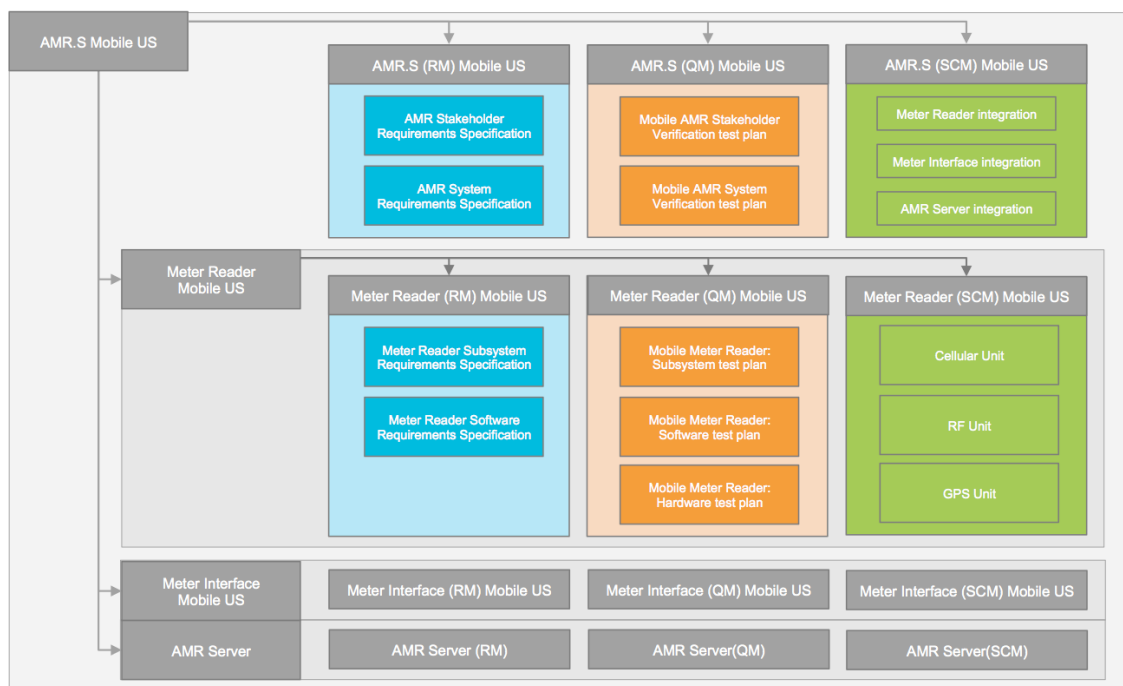


As indicated in the figure above, a *component* is a unit of organization consisting of a reusable set of artifacts. A *configuration* is a set of specific artifacts versions of a component. A modifiable (mutable)

configuration of a component is called a *stream*. An un-editable (immutable) configuration of a component is called a *baseline*. A baseline is used to record the state artifact versions in a release. Hence creating two separate configurations for EU and US will greatly help in managing variability of artifacts like requirements and tests across the two markets.

The Automated Meter Reader (AMR) teams are using components to organize the lifecycle artifacts under development. The teams have defined components for the system / product level and at each subsystem level, figure below. Separate components are used, at each level, to manage requirements, tests, designs and source code.

Stream and baselines can be added as *contributions* into *global configurations*. The Automated Meter Reader (AMR) teams are using such global configurations to assemble configurations of system and subsystem components containing requirements, tests, designs and source code into product definitions for the AMR product line. An example of the 'AMR.S Mobile US' global configuration is shown in the figure below. Note that global configurations can be hierarchical to support component reuse. The 'Meter Reader Mobile US' subsystem global configuration is a contribution to the 'AMR.S Mobile US' configuration.



This lab will not explore the detailed concepts of configuration management. You will focus on building reports and use predefined global configurations for reporting. If you do want to further deepen your understanding of configuration management use the appendix section of this lab handbook to use the Rational Configuration Management application to explore the global configurations and Rational DOORS NG and Rational Quality Manager to work with requirement, test cases and traceability links in a configuration context.

Build a new report from scratch

In this part of the lab you will act as Pete, the Project Manager, and you want to build a new report to be used on the QM dashboard. In building the new report you will create and preview a new lifecycle query.

Logging in to the Jazz applications

1. Open the Jazz applications in the Browser
 - a. Click on the **Firefox** icon on the Windows taskbar.



- b. Choose the **cm** bookmark to open the Rational Configuration Management application
Alternatively enter the URL **https://ssejtsserver:9443/vvc/web**
 - c. Log in as user: pete with password: pete

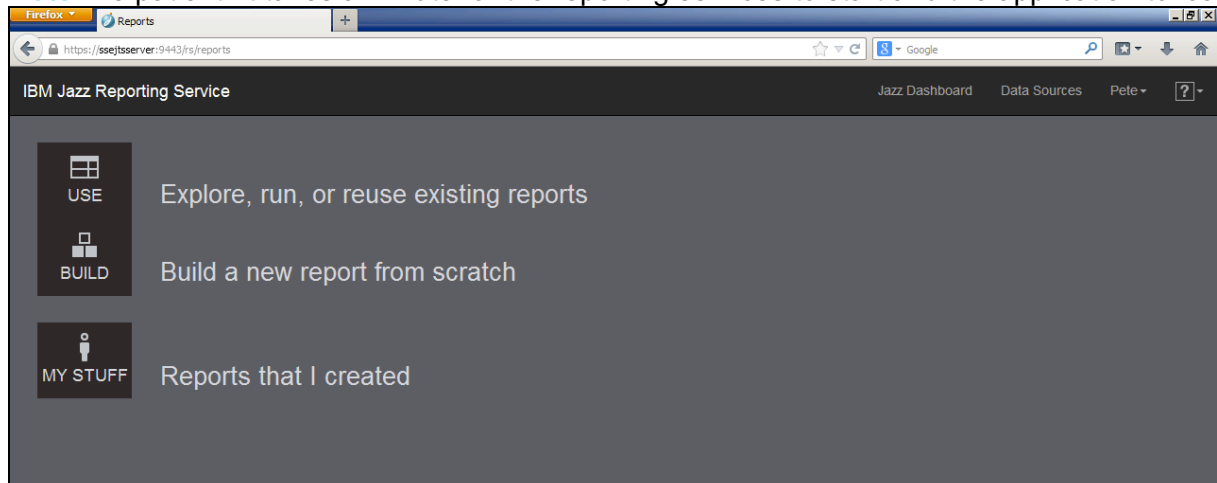


Start building a new report

1. Choose the **jrs** bookmark to open the IBM Jazz Reporting Service.
Alternatively enter the URL **https://ssejtsserver:9443/rs/reports**

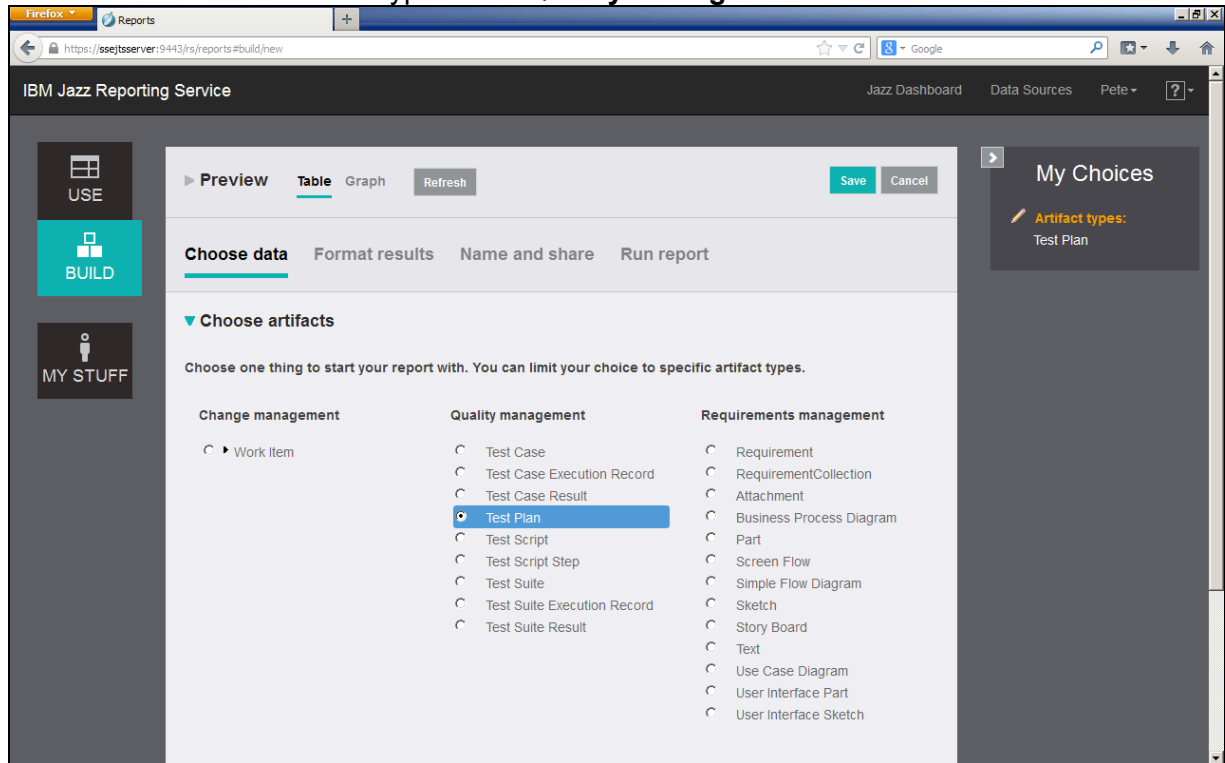
2. Wait for the Jazz Reporting Service application to load.

Note: Be patient. It takes a minute for the reporting services to start and the application to load.

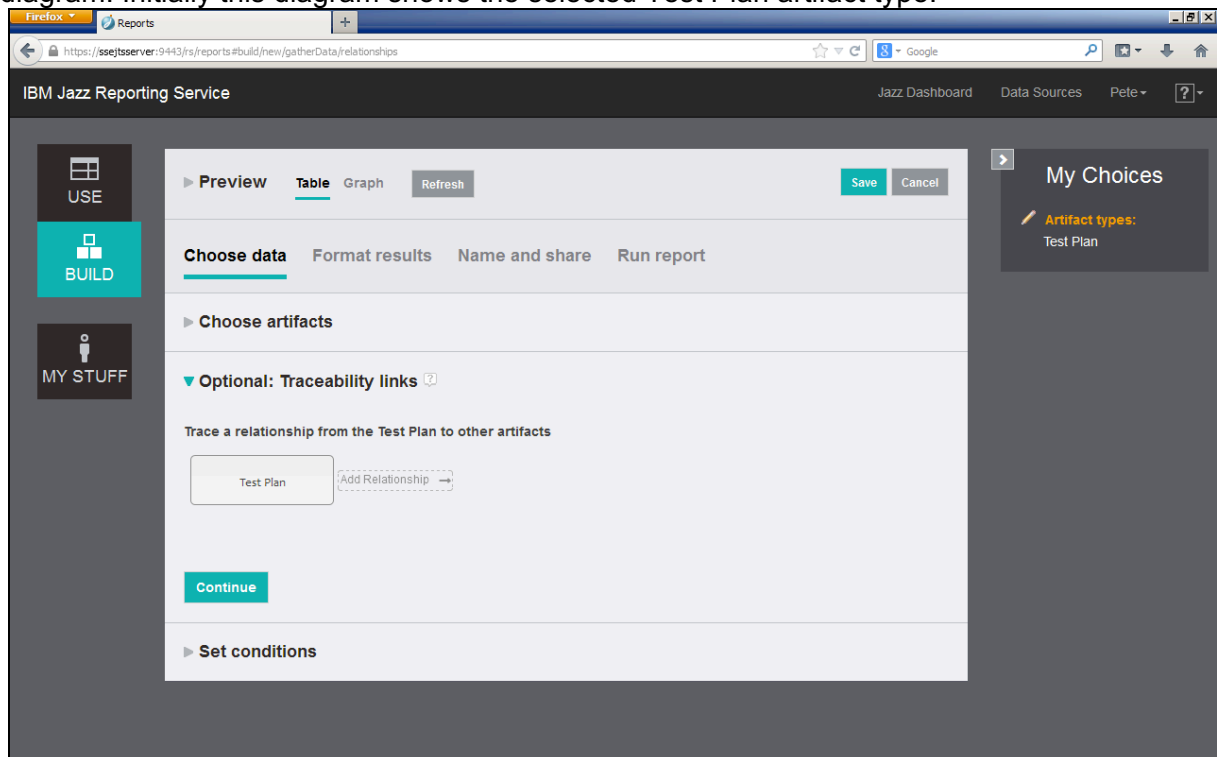


3. In the IBM Jazz Reporting Service home page, click on **BUILD** to create a new report from scratch.

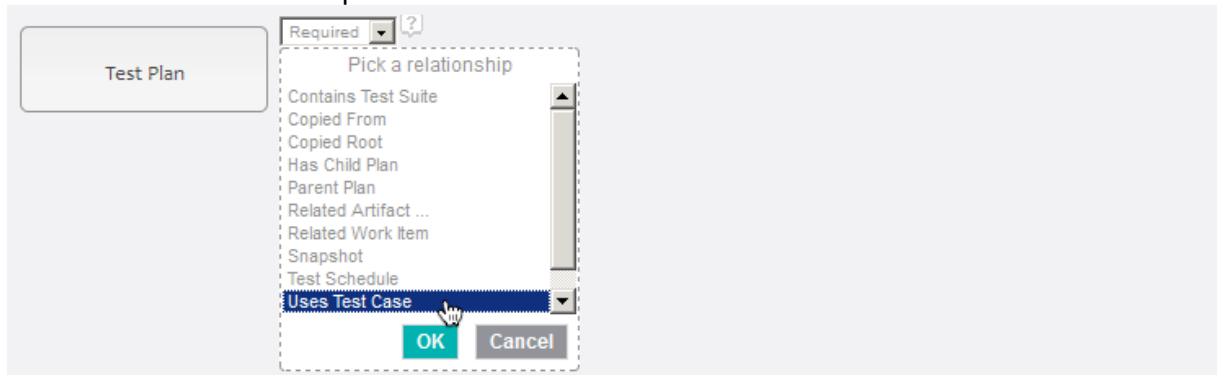
- The Report Builder starts with the first page to Choose data.
Select the **Test Plan** artifact type in the **Quality management** section.



- Scroll down on the page and click the **Continue** button, or alternatively, choose the **Optional: Traceability links** section.
- The Traceability links sections opens and visualize the selected reporting artifacts using a diagram. Initially this diagram shows the selected Test Plan artifact type.



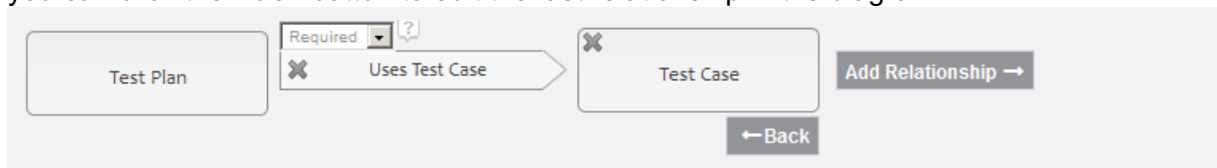
7. In the diagram, click on **Add Relationship...** area to the right of the Test Plan artifact. A list of artifact relationships to a Test Plan is shown.



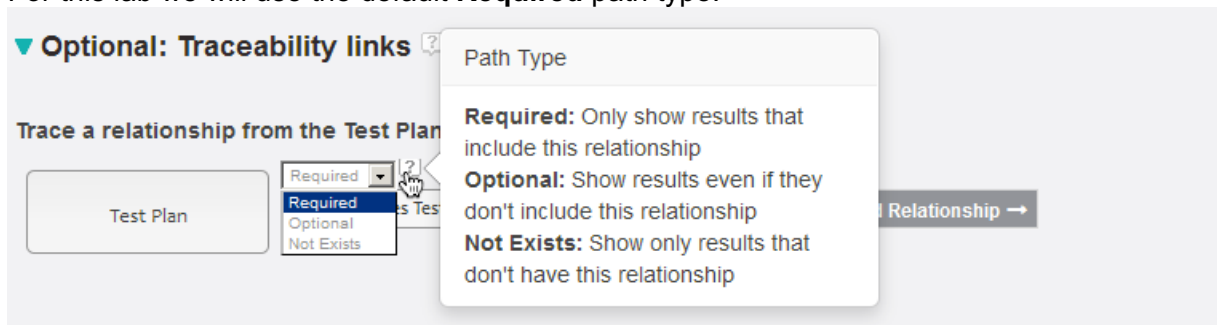
8. Choose the **Uses Test Case** relationship and click **OK**.

The Uses Test Case traceability link to a Test Case is added to the diagram

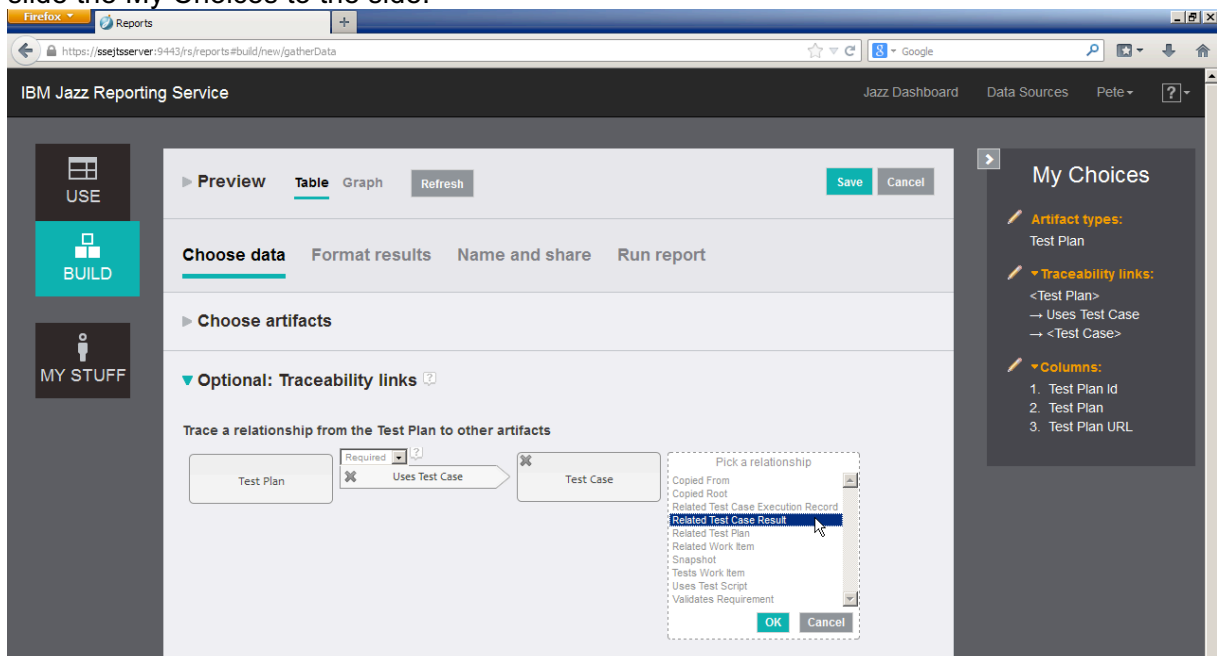
Note: You can remove traceability links by clicking the **X** icon on a relationship or an artifact or you can click the **Back** button to edit the last relationship in the diagram.



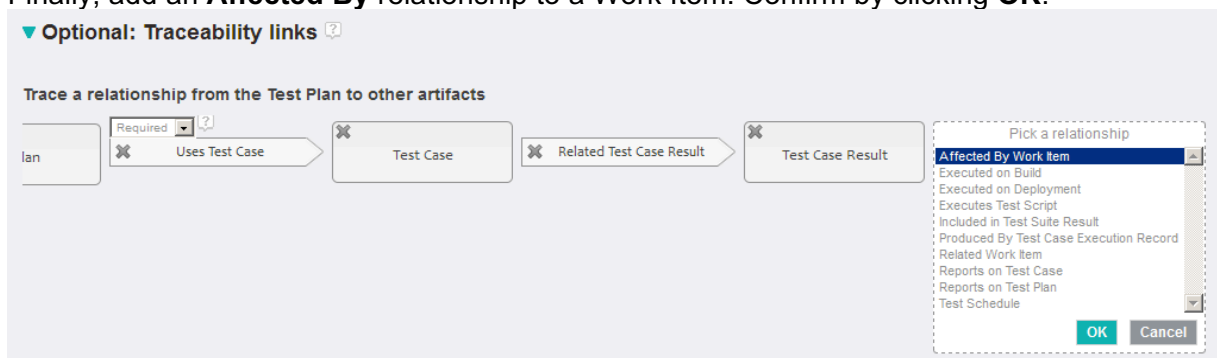
9. Using the Path Type you can specify what conditions to apply for a traceability link. For example, choose Required if you only want to report on Test Plans that have linked Test Cases, or Not Exists if you want to report on Test Plans that have no linked Test Cases. For this lab we will use the default **Required** path type.



10. Add a **Related** relationship from the Test Case to a Test Case Result. Confirm by clicking **OK**.
Note: Your choices are updated on the right side of the application window. Click on the > icon to slide the My Choices to the side.



11. Finally, add an **Affected By** relationship to a Work Item. Confirm by clicking **OK**.

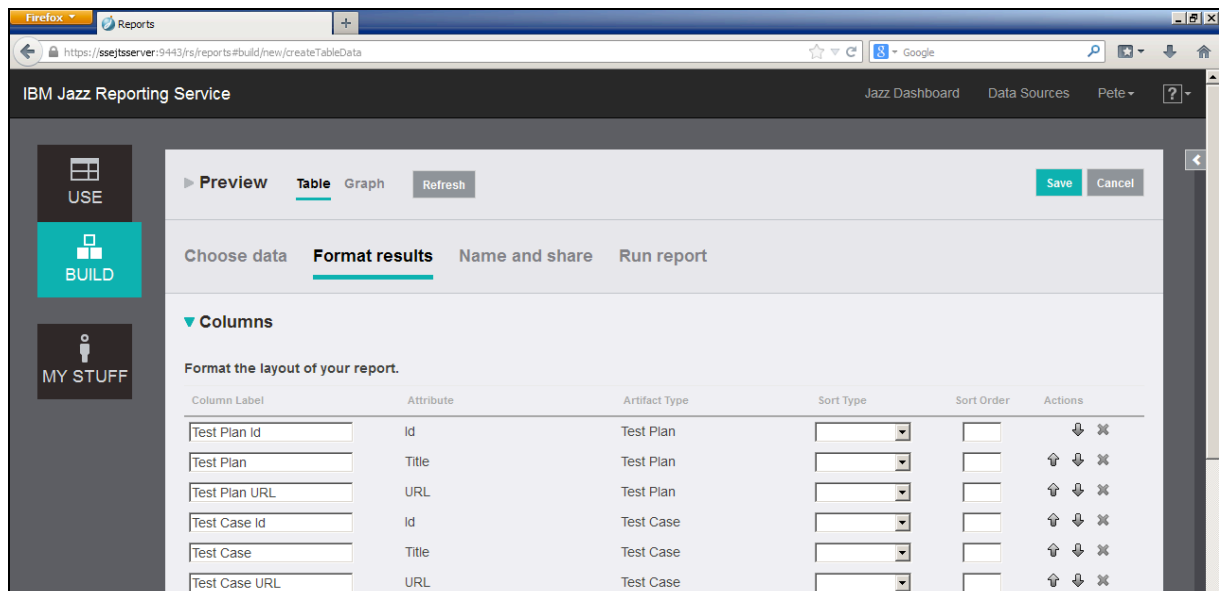


Traceability links identifying the artifacts to be reported on are now complete. The report will contain Test Plans and Test Cases that have failed when running and have a linked Defect.

We now want to format the report and add more information from the artifacts. For example, we are interested in seeing test case Verdict in the report. We also want to report on the State of the Defect to track if work on a fix has been started by the development.

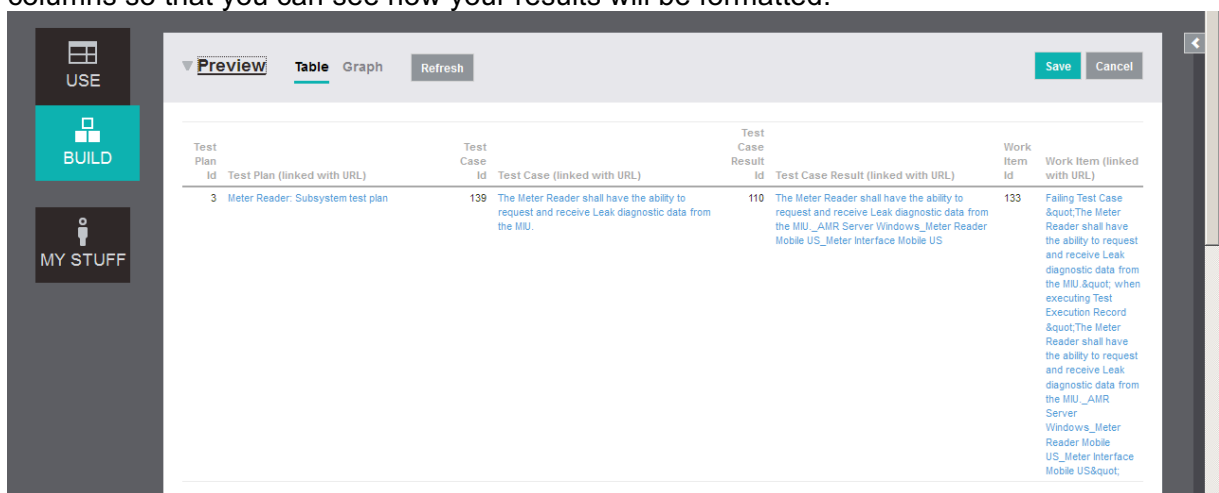
Formatting the new report

1. Switch to the **Format results** tab in the Report Builder.
The default columns for the artifacts in the reports are shown.



Note: Each artifact is by default reported with its Id, Title and URL.

- To preview the report, expand the Preview section at the top to the screen. This generates a view showing a small subset of the currently selected artifacts, traceability links and report columns so that you can see how your results will be formatted.



3. In the **Format results > Columns** section, locate the **Test Plan URL** and click on the **X** to remove the column.

Test Plan URL	URL	Test Plan			↑	↓	✕
Test Case Id	Id	Test Case			↑	↓	Remove from the report

Note: Removing the URL column on an artifact will disable the clickable hyperlink and rich hovers. After removing the URL, preview the report and note that the hyperlink on the Test Plans has been removed.

Test Plan Id	Test Plan	Test Case Id	Test Case (linked with URL)	Test Case Result Id	Test Case Result (linked with URL)	Work Item Id	Work Item (linked with URL)
3	Meter Reader: Subsystem test plan	139	The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU.	110	The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU_AMR Server Windows_Meter Reader Mobile US_Meter interface Mobile US	133	Failing Test Case "The Meter Reader shall have the ability to request and receive Leak

4. Scroll down on the page and locate the **Add columns** section. From the **Attributes of:** list, choose the **Test Case Result** artifact type.

Add columns

Attributes of: Test Case Result [Type: Test Case Result]

Search: Test Case Result [Type: Test Case Result]
 Test Case [Type: Test Case]
 Test Plan [Type: Test Plan]
 Work Item [Type: Work Item]

☐ Select all

☐ Category

☐ Channel

5. In the **Attributes of:** search field, type **verdict**. Select the **Verdict** attribute and click **Add columns**.

Add columns

Attributes of: Test Case Result [Type: Test Case Result]

Search: ve

☐ Select all

☐ Points Inconclusive

☒ Verdict

Add columns

6. Select the **Work Item** artifact type, the **Status** attribute and click **Add columns**

Add columns

Attributes of: Work Item [Type: Work Item]

Search: status

☐ Select all

☒ Status

- In the list of selected columns, locate the Test Case Result Verdict attribute (at the end of the list). Click the Arrow to move the column up in the list. Move it to just below the Test Case Result Id column.

Test Case Result Id	Id	Test Case Result			↑ ↓ ×
Test Case Result Verdict	Verdict	Test Case Result			↑ ↓ ×
Test Case Result	Title	Test Case Result			Move up (Click or Press <enter> key to invoke)
Test Case Result URL	URL	Test Case Result			↑ ↓ ×

- Scroll up on the page and preview the changes to the report.

▼ Preview Table Graph Refresh								
Test Plan		Test Case	Test Case Result		Test Case Result		Work Item	Work Item
Id	Test Plan	Id	Test Case (linked with URL)	Id	Verdict	Test Case Result (linked with URL)	Id	Work Item (linked with URL)
3	Meter Reader: Subsystem test plan	139	The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU.	110	Blocked	The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU_AMR Server Windows_Meter Reader Mobile US_Meter Interface Mobile US	133	Failing Test Case "The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU " when executing Test Execution Record "The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU_AMR Server Windows_Meter Reader Mobile US_Meter Interface Mobile US"
								New

Note: Verdict has been placed to the right of the Test Result ID and the Status of the Defect has been added to the report.

The editing of the reports is complete and we will proceed and save our work as a reusable report.

Saving the new report

1. Switch to the **Name and share** tab in the Report Builder.
In the **Details** section, enter a **Report name** and choose **Public** from the **Privacy and Sharing** options.

The screenshot shows the 'Name and share' tab in the IBM Jazz Reporting Service. The 'Details' section contains the following fields:

- Report Name:** Test case results with defects
- Description:** (empty text area)
- Tags:** (empty list)
- Privacy and Sharing:** A dropdown menu with three options: 'Private (visible only to me)', 'Public (publish to catalog)', and 'Private (visible only to me)'. The 'Public (publish to catalog)' option is selected.

Buttons for 'Save', 'Cancel', and 'Continue' are visible at the bottom of the form.

2. Click **Save** to publish your report.
You get a visual confirmation that the report was saved.
3. To view your report, and reports shared by others, click on **USE**.

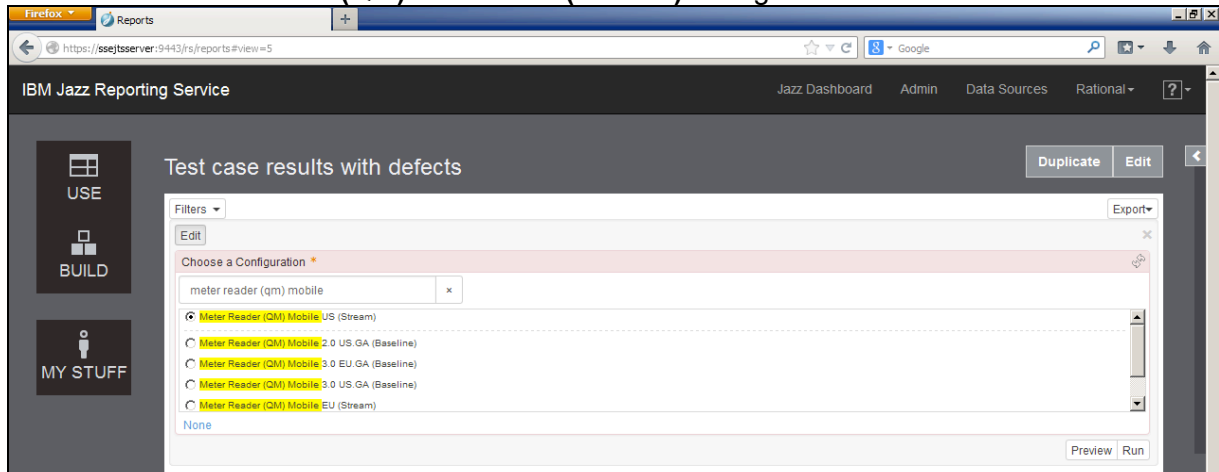
The screenshot shows the 'USE' tab in the IBM Jazz Reporting Service. It displays a table of reports with the following columns: Actions, Type, Report Name, Description, Sharing, and Owner.

Actions	Type	Report Name	Description	Sharing	Owner
	Test Case Results	Test case results with defects		Public	Rational

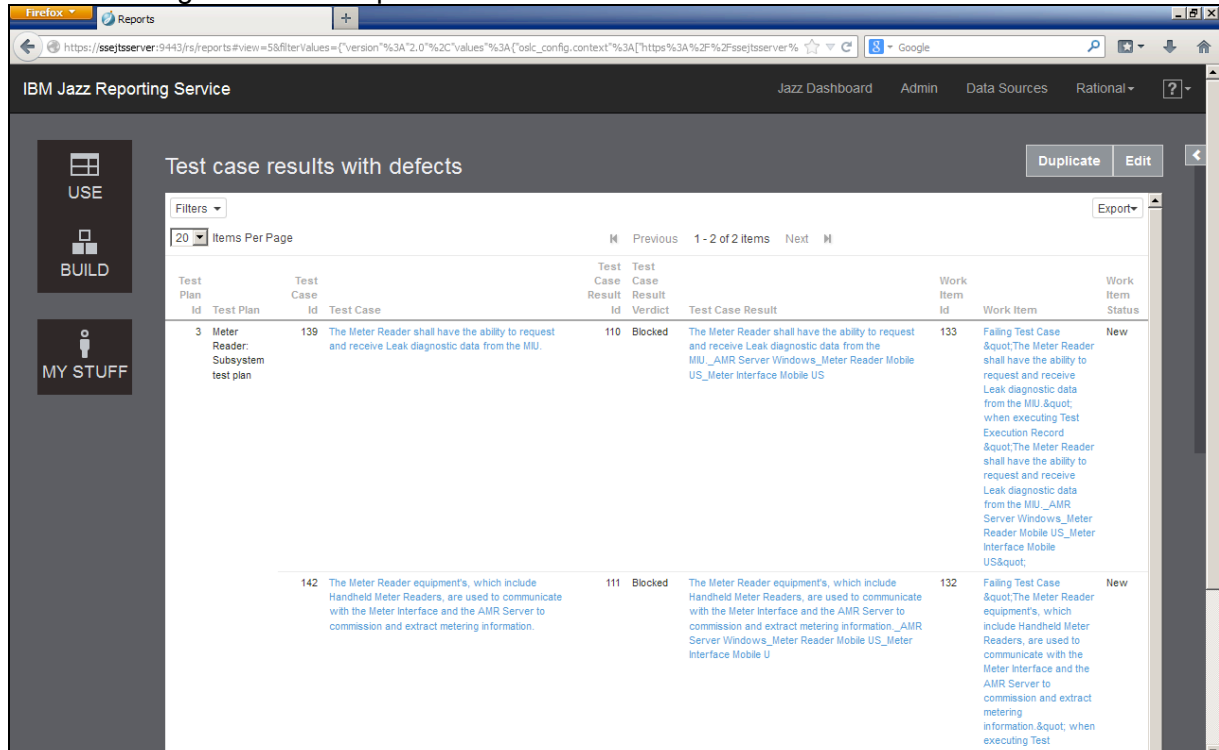
Note: You can quickly find report by typing in a portion of the name in the **Type to Filter** field.

- Click on the **Report Name** to run the report.

Your report needs information on what configuration context to use when running the report query. In the **Choose a Configuration** search box, type “Meter Reader (QM) Mobile US”. Select the **Meter Reader (QM) Mobile US (Stream)** configuration from the search result.



- Click **Run** to generate the report.



6. The report provides both links and rich hovers to the artifacts.
Place the cursor over a Test Case Result. Wait a few seconds for the rich hover to open.

The screenshot shows the IBM Jazz Reporting Service interface. The main heading is "Test case results with defects". A rich hover overlay is displayed over a test case result. The overlay contains the following information:

Overview

- Result: Blocked
- State: Draft
- Environment: AMR Server Windows_Meter Reader Mobile US_Meter Interface Mobile US
- Test Case: The Meter Reader shall have the ability to request and receive Leak diagnostic data from the MIU.

Details

Type:	Test Case Result	Start Time:	Dec 17, 2014 3:33:00 AM
Modified:	Dec 17, 2014 3:37:33 AM	End Time:	Dec 17, 2014 3:33:00 AM
Host Name:		Total Run Time:	0 sec
Test Plan:	Meter Reader: Subsystem test plan	Iteration:	AMR 4.0 - M1
Owner:	Unassigned	Originator:	Rational
Test Script:		Project Area:	Meter Reader (QM)
Weight:	100	Team Area:	

The background shows a table of test case results. The first row is highlighted, showing a test case result with a status of "New". The table has columns for "Test Case Result", "Work Item Id", "Work Item", and "Work Item Status".

7. Optionally, click on a link to open one of the test cases in IBM Rational Quality Manager or a defect in IBM Rational Team Concert.

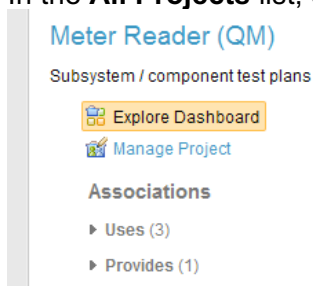
Note: You can hold down the ctrl-key when clicking to open the test case or defect in a new browser tab.

Using reports on Dashboards

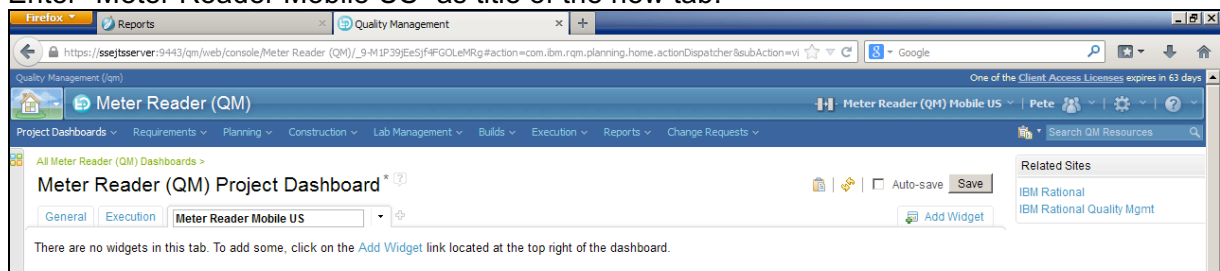
In this part of the lab you will continue to act as Pete, the Project Manager, and add your new report on the QM dashboard.

Add a report to the QM Dashboard

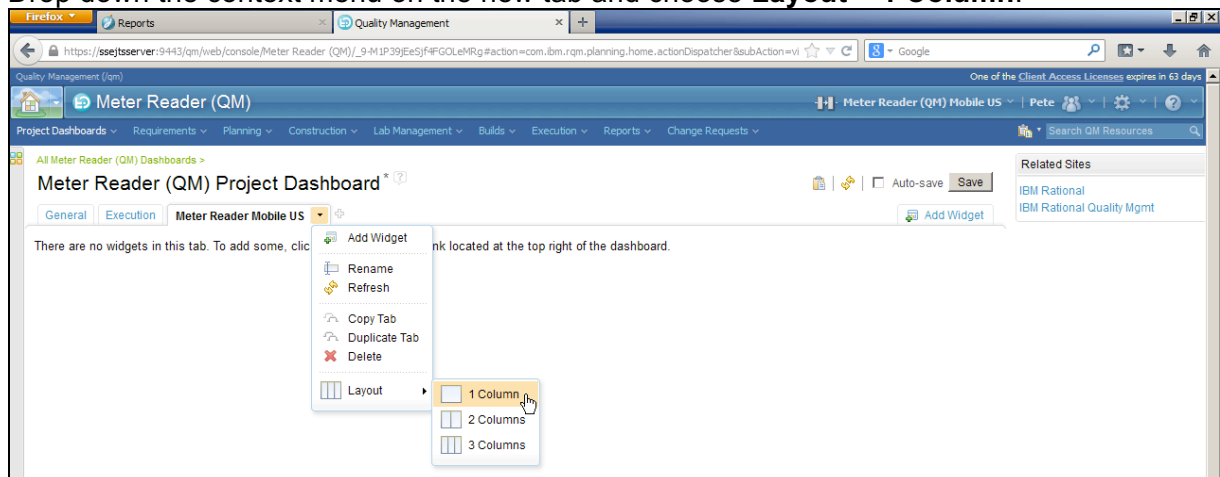
1. Choose the **qm** bookmark to open the IBM Rational Quality Manager application.
Alternatively enter the URL **https://ssejtssserver:9443/qm/web**
2. In the **All Projects** list, click **Explore Dashboard** in the 'Meter Reader (QM)' section.



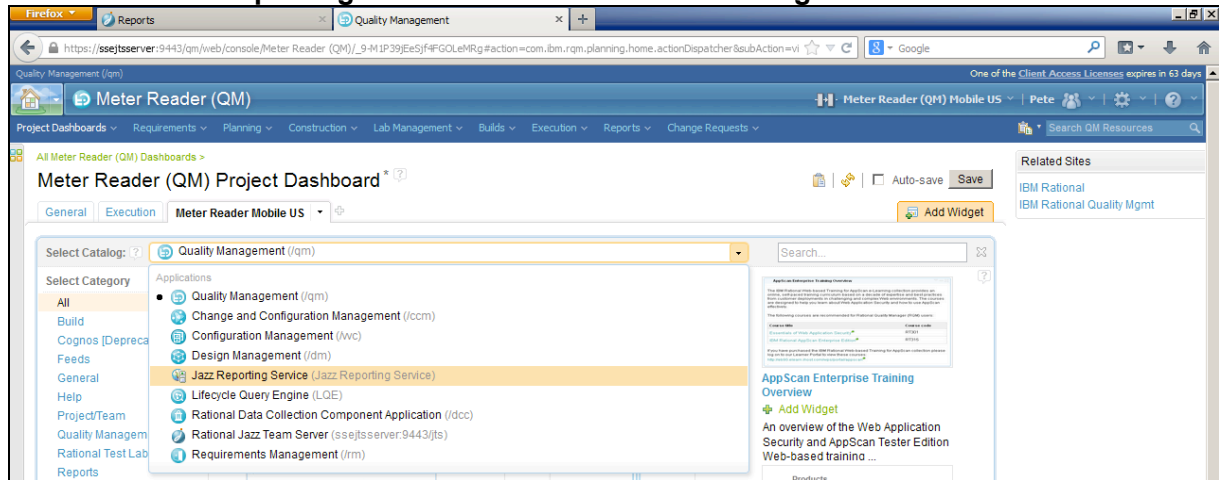
3. On the **Meter Reader (QM) Project Dashboard**, click the **+** icon to add a new tab.
Enter "Meter Reader Mobile US" as title of the new tab.



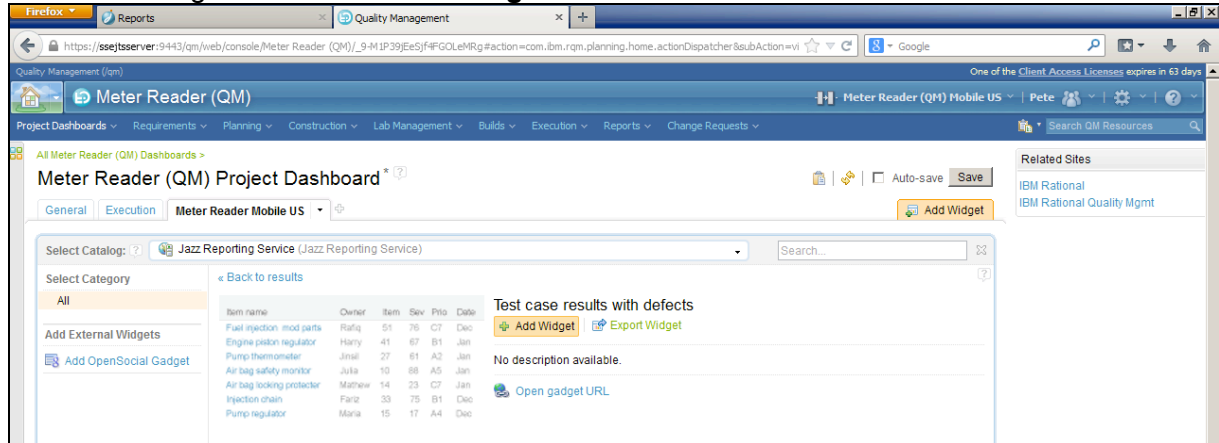
4. Drop down the context menu on the new tab and choose **Layout > 1 Column**.



5. Click on **Add Widget** to add a new widget to the dashboard from the service catalog. Select the **Jazz Reporting Service** from the **Service Catalog** list

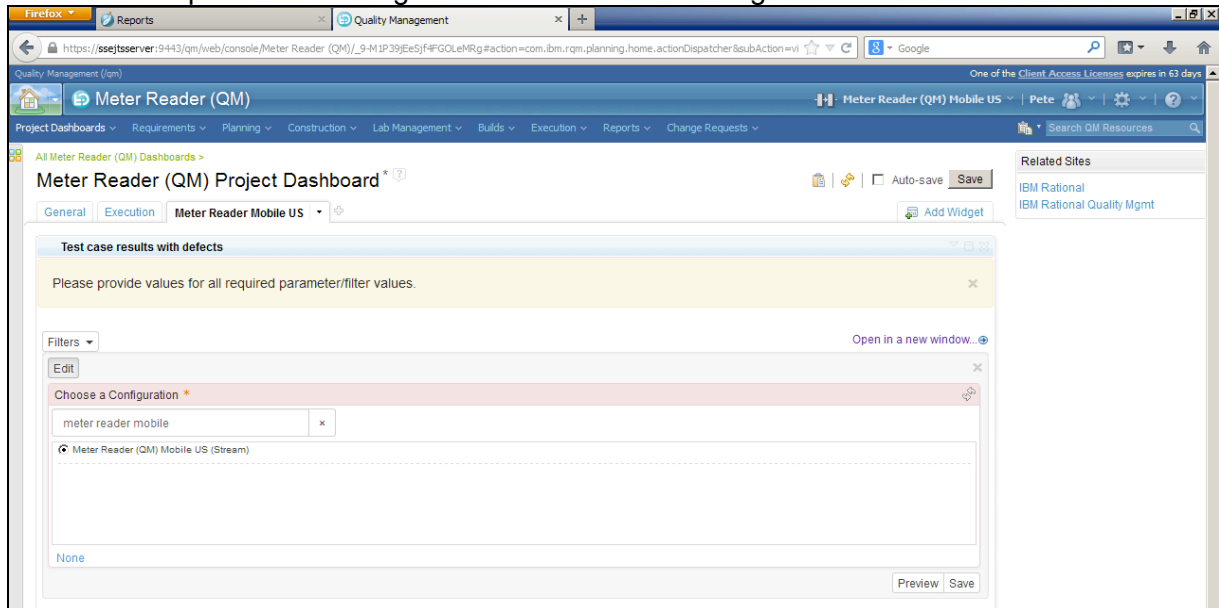


6. Locate the report you created and saved in the previous section of the lab. Select the widget and click **+ Add Widget**.

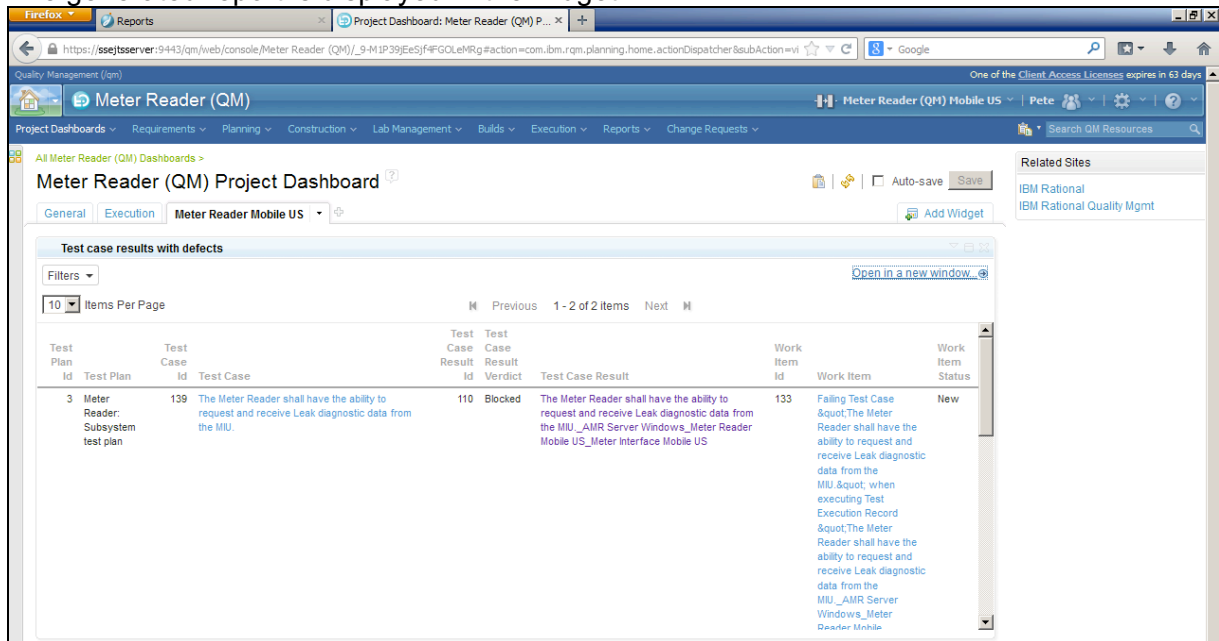


Note: The widget may require you to log in. Enter pete as user id and password.

7. To run the report you need to provide a configuration context.
Repeat the steps in the previous section to configure with the 'Meter Reader (QM) Mobile US' stream configuration.
Click **Save** to persist the configuration context for this widget.

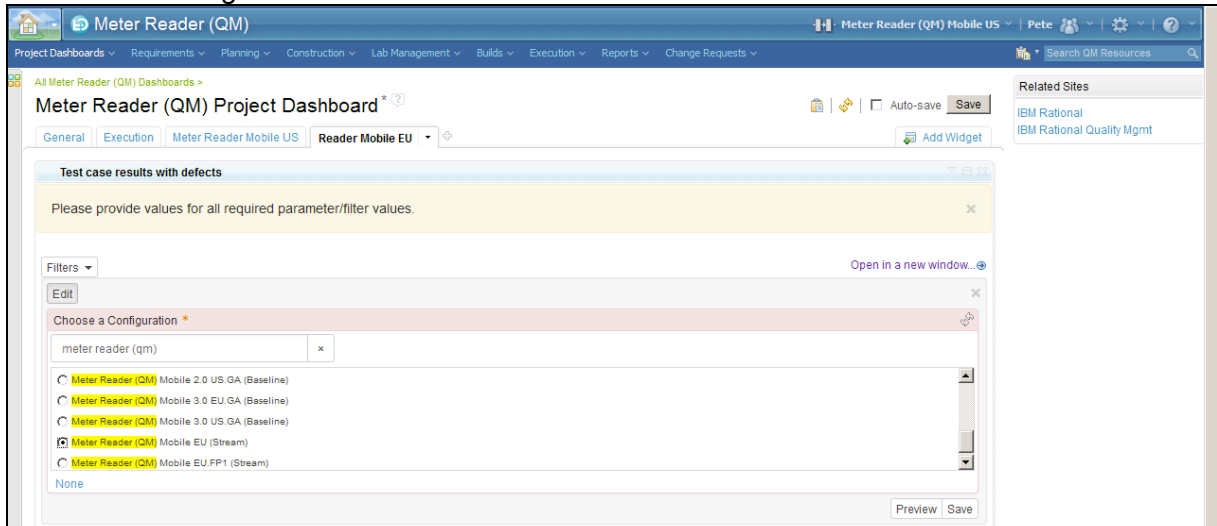


8. The generated report is displayed in the widget.

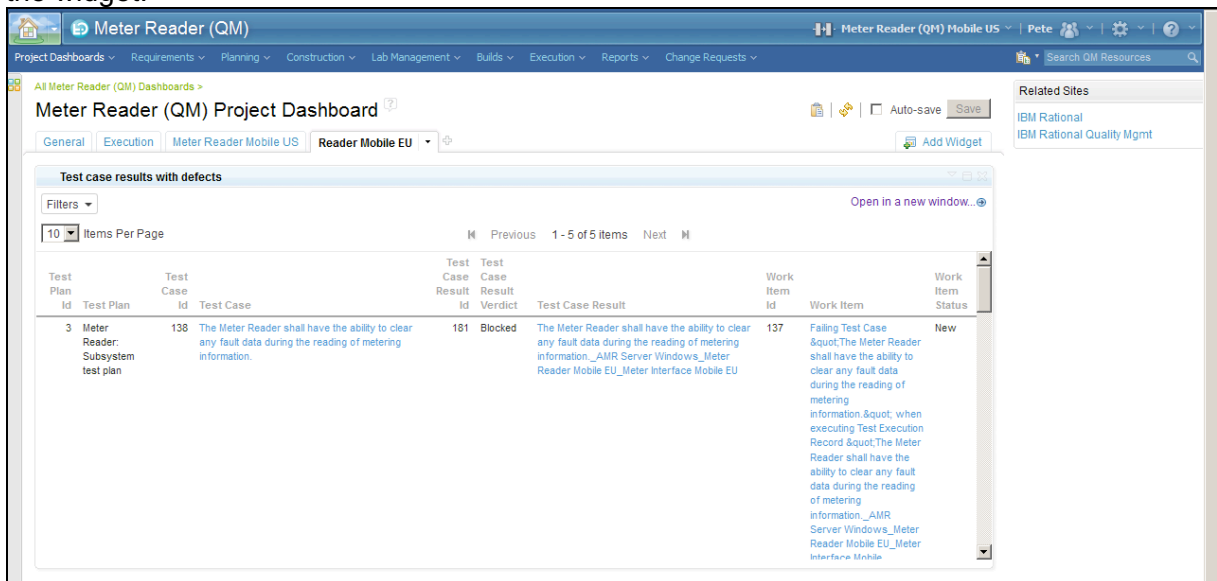


Add report on multiple configurations

1. Repeat the steps in the previous section to add a second tab to the dashboard.
 - a. Name the tab Meter Reader Mobile EU.
 - b. Set the tab layout to one column
 - c. Add the report widget to the tab
2. When choosing the configuration context for the query, choose the 'Meter Reader (QM) Mobile EU' stream configuration.



3. The report runs on artifacts in the 'Meter Reader (QM) Mobile EU' configuration and displays in the widget.



4. Compare the two reports with Mobile US and Mobile EU defects.

Design your own Dashboard

In this part of the lab is optional and you will explore your design ideas on your reports and dashboards.

You now have basic skills to create reports and dashboards. Return to your design sketches and notes from the initial design ideation session. Use the Jazz Reporting Service to explore your design ideas.

1. Pick one or more of the reports you earlier designed
2. Create reports using the Jazz Reporting Service report editor
3. Preview and save the reports
4. Add the reports to a new tab in the QM dashboard

Summary of this Lab

You have in this lab explored the IBM solutions for Configuration Management, Reporting and Analytics

- Exploring Configuration Management concepts
- Used the global configuration context to navigate and edit artifacts and links
- Built a new query using the query builder
- Configured the query for configuration aware reporting
- Added queries to run as viewlets on a project dashboards

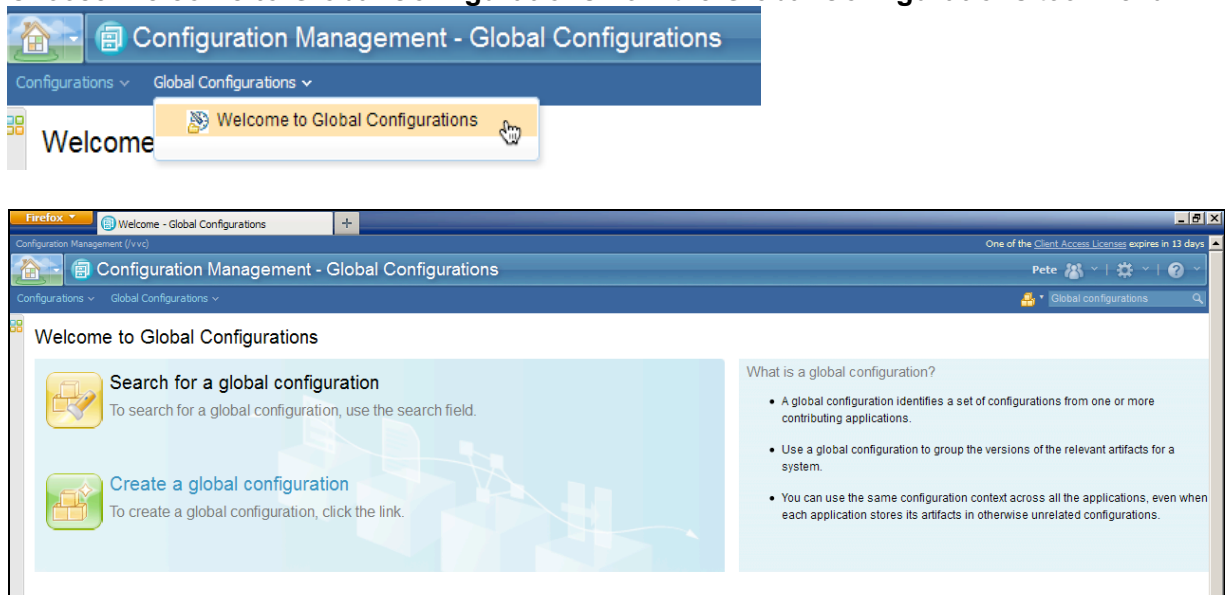
Visit [IBM.com](https://www.ibm.com) for more information on the Configuration Management, Reporting and Analytics capabilities in the Systems and Software Engineering solution.

Appendix – Configuration Management Concepts

You will in this appendix explore the 'AMR.S Mobile US' global configurations used by the Automated Meter Reader (AMR).

Explore global configurations

1. Choose **Welcome to Global Configurations** from the **Global Configurations** tool menu

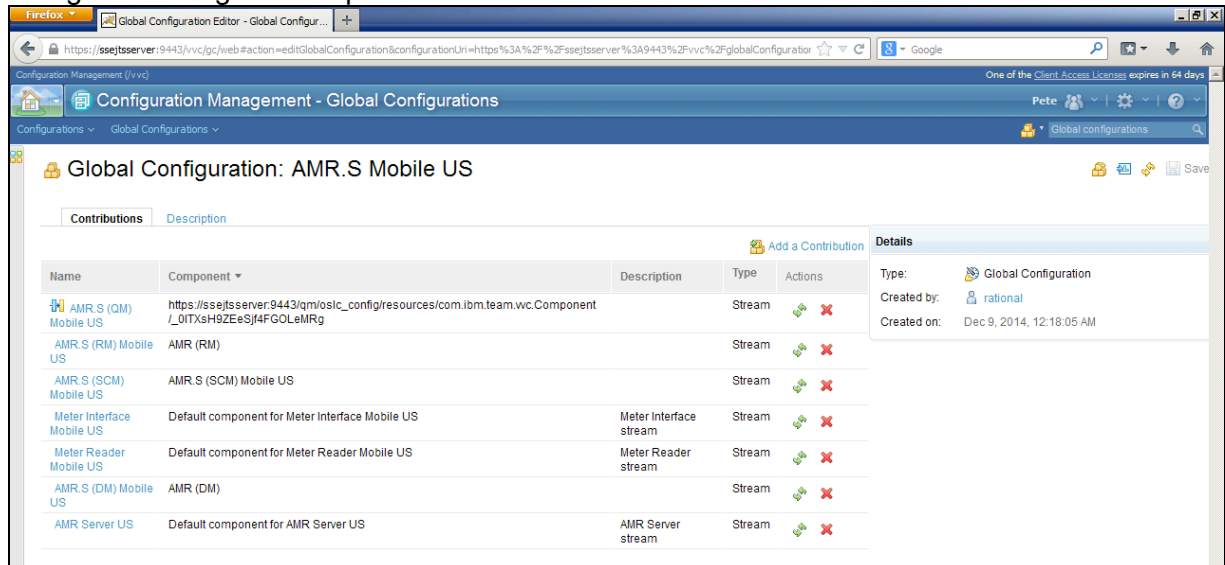


2. In the Quick Search field, type **AMR . s**



Note: The list shows the product configurations defined by the AMR development team. The product line covers the Manual, Mobile and Grid version of the AMR products and configurations for the US and EU markets.

- From the Quick Search list, select the 'AMR.S Mobile US' global configuration.
The global configuration opens in the editor.



Note: The editor shows the project area configurations that are contributing to the 'AMR.S Mobile US' global configuration. (You may compare this list with the figure in the introduction to this part where we discussed the structure of the AMR global configuration and its contributions.)

The contributions in the list cover requirement, test, model and implementation artifacts in IBM Rational DOORS Next Generation, IBM Rational Quality Manager, IBM Rational Rhapsody Design Manager and IBM Rational Team Concert applications.

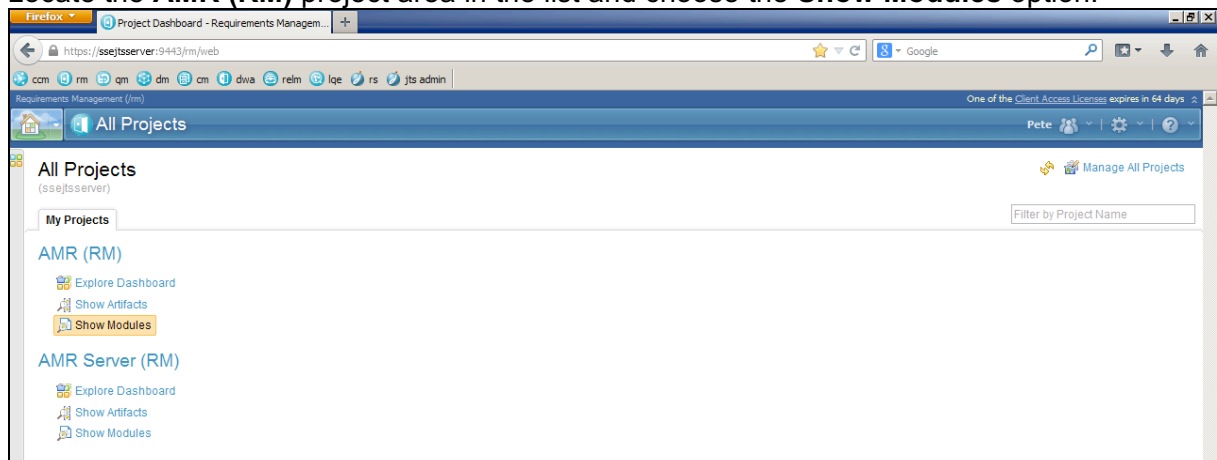
Optionally, click on the 'Meter Reader Mobile US' global configuration to explore the subsystem configuration.

Working in a Configuration Context

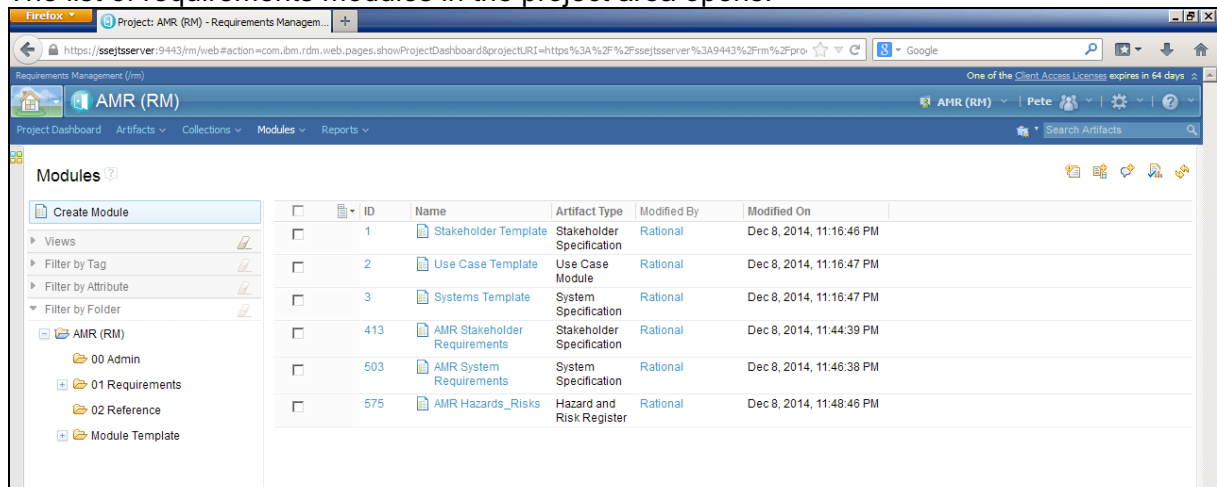
You will now use the traceability links established between the artifacts and navigate in the context of the 'AMR.S Mobile US' global configuration. You will use Rational DOORS NG and Rational Quality Manager to explore requirement and test cases.

- Choose the **rm** bookmark to open the Rational DOORS NG application.
Alternatively enter the URL `https://ssejtsserver:9443/rm/web`.
- The requirement management application loads and opens the All Projects page.

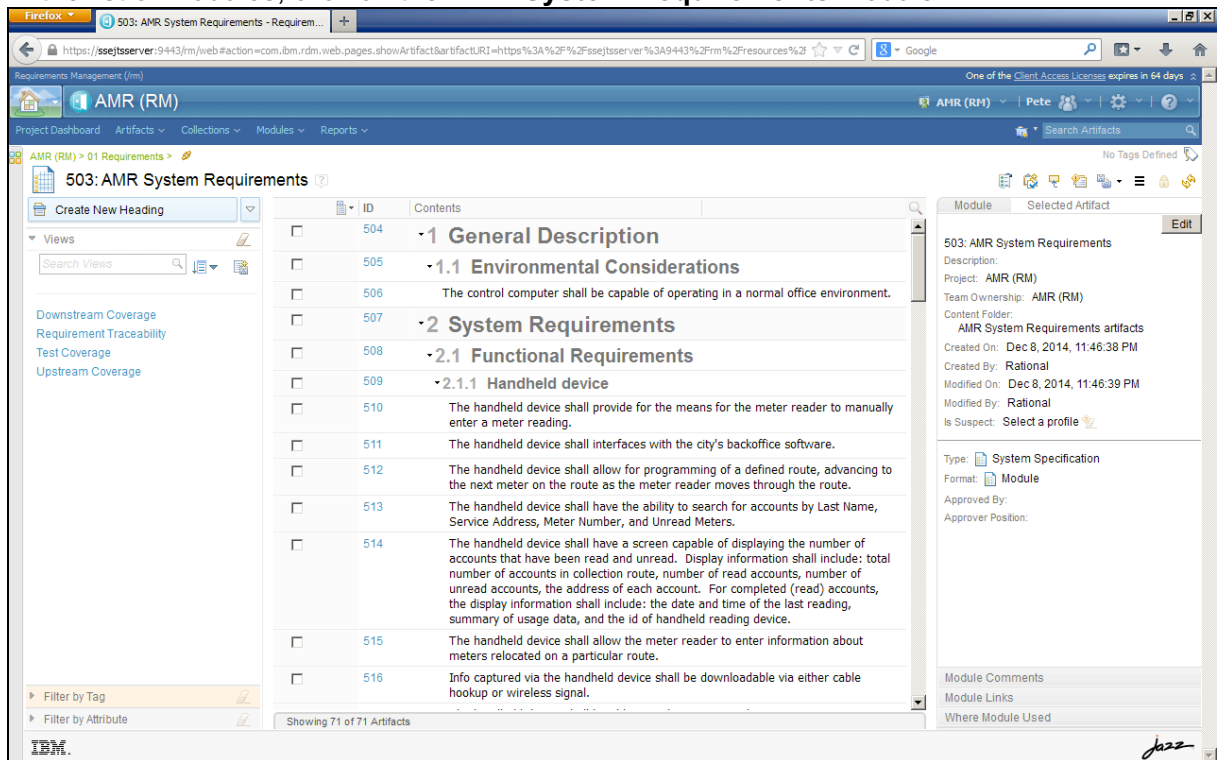
3. Locate the **AMR (RM)** project area in the list and choose the **Show Modules** option.



4. The list of requirements modules in the project area opens.

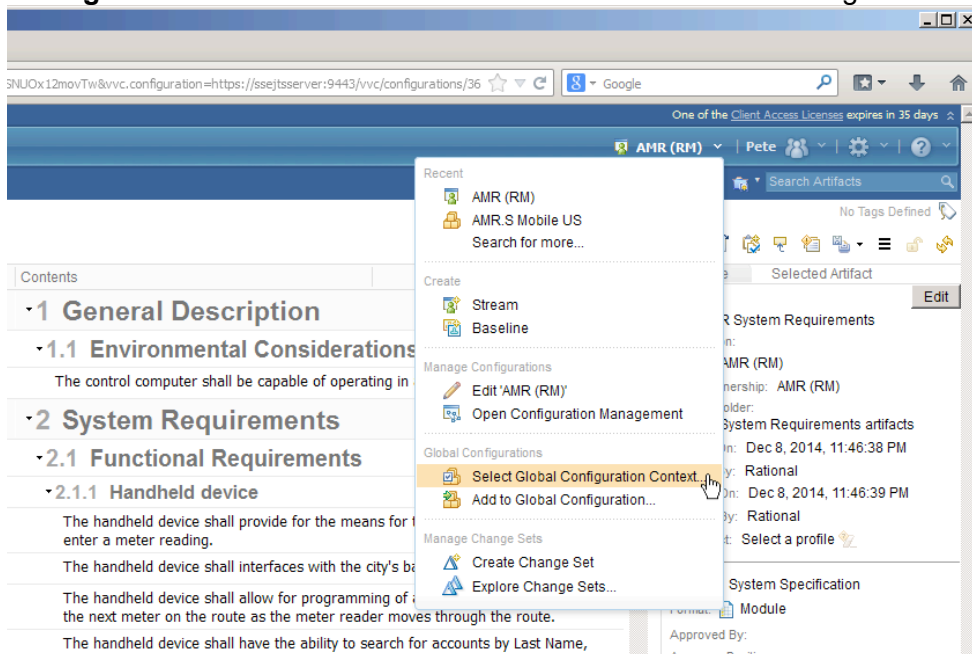


- In the list of modules, click on the **AMR System Requirements** module.

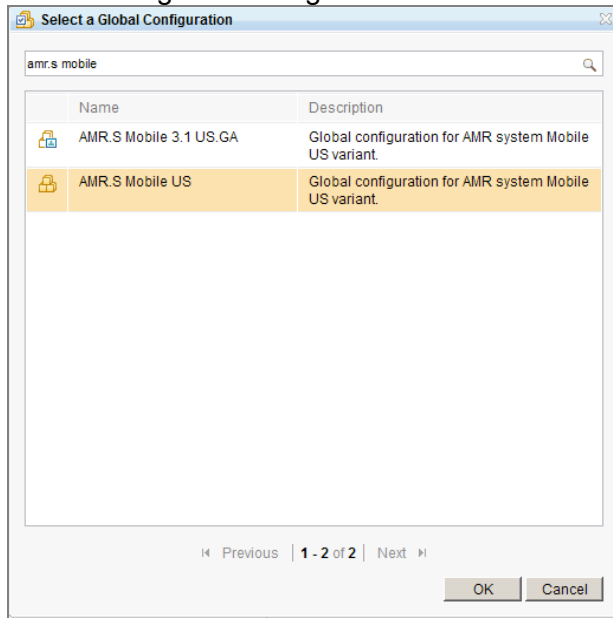


Note: A global configuration context has not yet been selected and the module is opened in the default 'AMR (RM)' configuration.

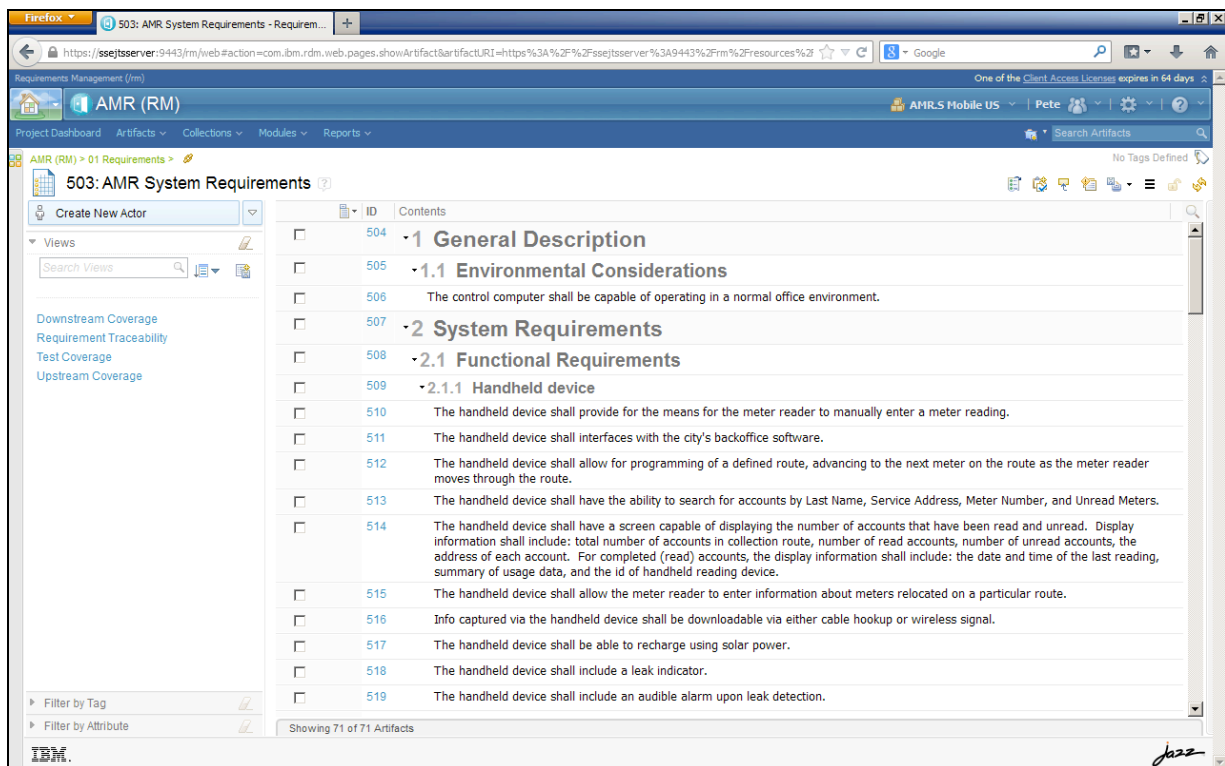
- From the configuration management menu on the banner, choose the **Select a Global Configuration Context....** command. The Select a Global Configuration dialog opens



7. In the Select a Global Configuration dialog, type AMR.S in the search field and select the 'AMR.S Mobile US' global configuration. Click **OK**.



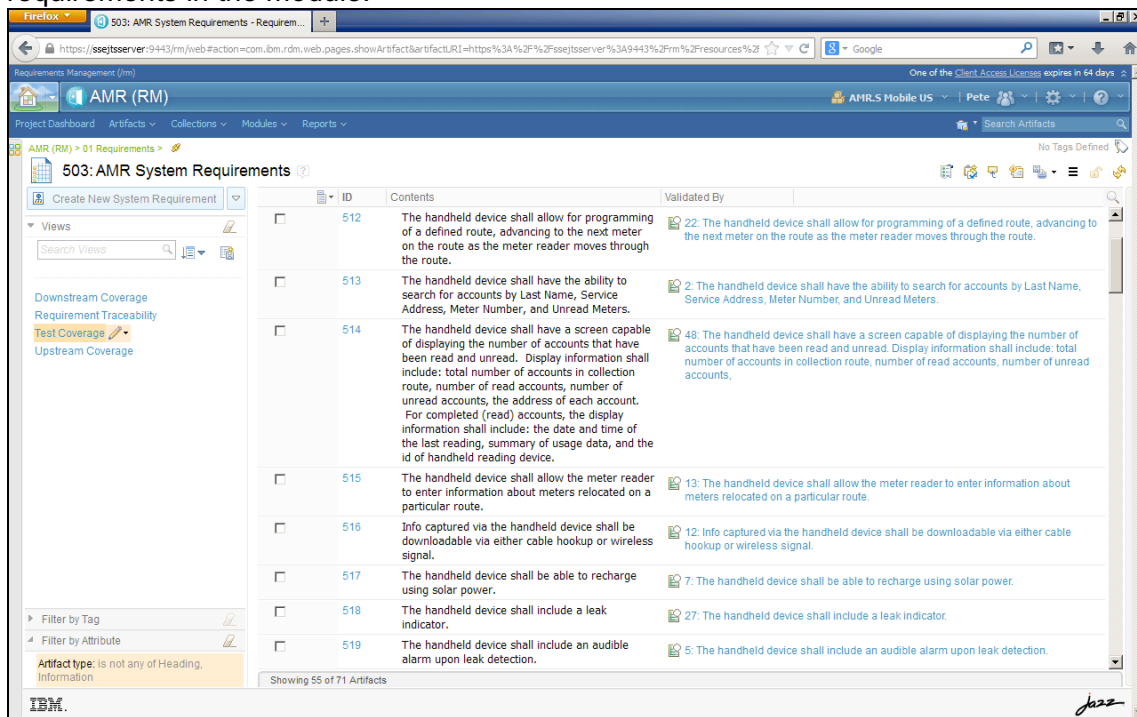
8. The configuration context is updated to the 'AMR.S Mobile US' on the banner.



Note: Only the artifacts in the selected configuration context are shown.

Updating, adding or removing artifacts in the configuration will not impact other configurations, for example requirements in the Manual or Grid products.

9. From the list of Views (on the left side) click on the **Test Coverage** view. The view is applied to the module and adds information about system validation test cases that are linked to system requirements in the module.

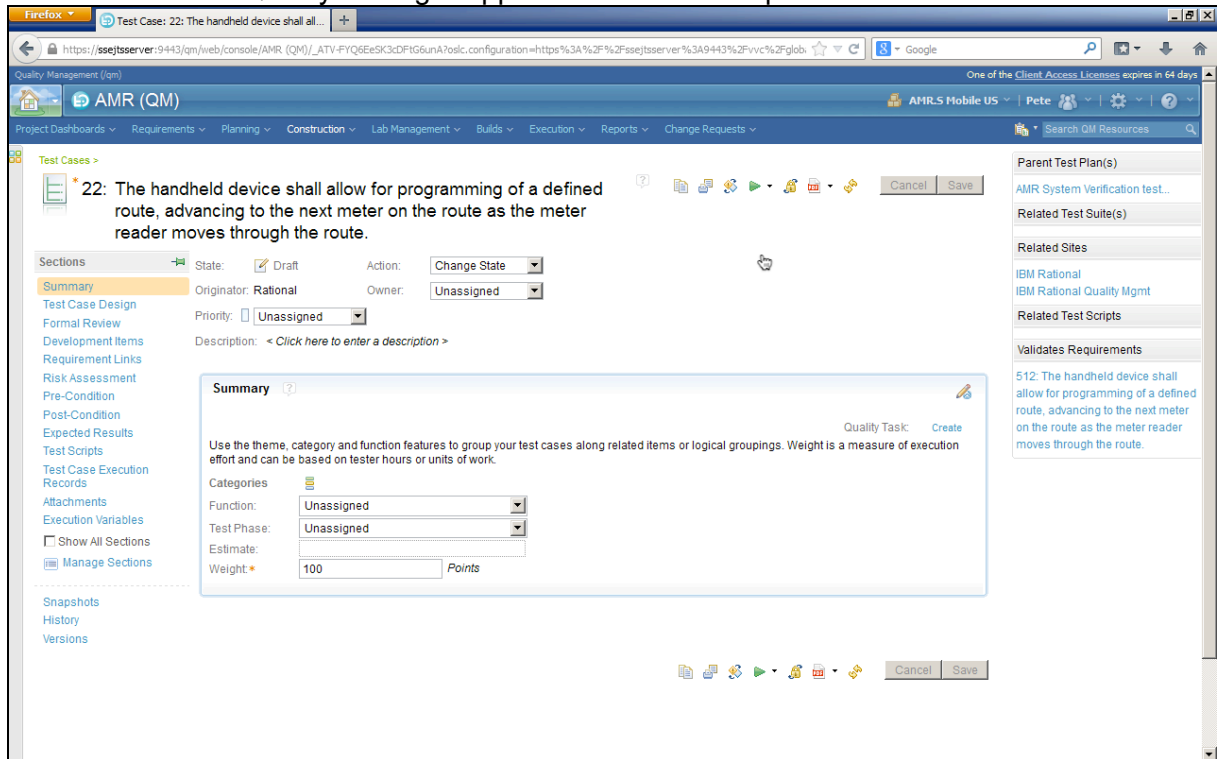


Note: The traceability links are also under configuration management in IBM Rational DOORS Next Generation. Updating, adding or removing artifact links in the configuration will not impact other configurations.

The views in IBM Rational DOORS Next Generation provide a summary of requirements and their traceability links. The Jazz Reporting Service provides additional flexibility in reporting on artifacts and their traceability relations.

10. Click on one of the test cases in the **Validated By** column.

The IBM Rational Quality Manager application loads and opens the linked test case.



Note: The configuration context in IBM Rational Quality Manager is set to 'AMR.S Mobile US'. Navigation across artifacts and links are made in context of the selected global configuration.

We have completed our short exploration of product configurations, artifacts and traceability links in

- IBM Rational Configuration Manager
- IBM Rational Quality Manager
- IBM Rational DOORS Next Generation

Teams using product configurations need to report on artifacts and traceability links in context of such product configurations.