IBM Rational Change for DOORS Interface

Administration Guide

Release 5.7

Before using this information, be sure to read the general information under Appendix: "Notices" on page 31.

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1 *Introduction*

The *IBM® Rational® Change for DOORS® Interface Administration Guide* is intended for administrators and contains complete administrative descriptions and instructions for the following:

- Product Requirements (page 7)
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See the *IBM Rational Change for DOORS Interface User Guide* (located at http://publib.boulder.ibm.com/infocenter/rsdp/v1r0m0/index.jsp) for instructions about the following:

- Interface Packages
- Requirements Gathering
- Requirements Change Management
- Requirements Implementation

Assumptions

Before using this document, you should have a basic understanding of how to use IBM® Rational ® DOORS® and IBM® Rational® Change. If you are unfamiliar with these products, documentation is available in the [Rational Software Information Center](#).

Conventions

The following describes the conventions used in this document.

Typefaces and symbols

Typeface	Description
Italic	Used for book titles and terminology. Also designates names of roles (*developer*), states (*working*), groups (*ccm_root*), and users (*sue*).
Bold	Used for items that you can select, such as buttons, icons, and so forth., and menu paths. Also used for the names of dialog boxes, dialog box options, toolbars, folders, baselines, databases, releases, properties, and types. Also used for emphasis.
`Courier`	Used for commands, filenames, and directory paths. Represents command syntax to be entered verbatim. Signifies computer output that displays on-screen.
`Courier Italic`	Represents values in a command string that you supply. For example, (*drive*:*username**commands*).

This document also uses the following conventions:

Note A note contains important information that should not be overlooked.

Caution A caution indicates potential danger to the database, the database server, or some other integral piece of the Rational Change for DOORS Interface software or your system.

Contacting IBM Rational Software Support

If the self-help resources have not provided a resolution to your problem, you can contact IBM® Rational® Software Support for assistance in resolving product issues.

Note If you are a heritage Telelogic customer, a single reference site for all support resources is located at http://www.ibm.com/software/rational/support/telelogic/

Prerequisites

To submit your problem to IBM Rational Software Support, you must have an active Passport Advantage® software maintenance agreement. Passport Advantage is the IBM comprehensive software licensing and software maintenance (product upgrades and technical support) offering. You can enroll online in Passport Advantage from http://www.ibm.com/software/lotus/passportadvantage/howtoenroll.html

- To learn more about Passport Advantage, visit the Passport Advantage FAQs at http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.html.

- For further assistance, contact your IBM representative.

To submit your problem online (from the IBM Web site) to IBM Rational Software Support, you must additionally:

- Be a registered user on the IBM Rational Software Support Web site. For details about registering, go to http://www.ibm.com/software/support/.

- Be listed as an authorized caller in the service request tool.

Submitting problems

To submit your problem to IBM Rational Software Support:

1. Determine the business impact of your problem. When you report a problem to IBM, you are asked to supply a severity level. Therefore, you need to understand and assess the business impact of the problem that you are reporting.

Use the following table to determine the severity level.

Severity	Description
1	The problem has a *critical* business impact: You are unable to use the program, resulting in a critical impact on operations. This condition requires an immediate solution.
2	This problem has a *significant* business impact: The program is usable, but it is severely limited.
3	The problem has *some* business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has *minimal* business impact: The problem causes little impact on operations or a reasonable circumvention to the problem was implemented.

2. Describe your problem and gather background information, When describing a problem to IBM, be as specific as possible. Include all relevant background information so that IBM Rational Software Support specialists can help you solve the problem efficiently. To save time, know the answers to these questions:

- What software versions were you running when the problem occurred?

  To determine the exact product name and version, use the option applicable to you:

  - Start the IBM Installation Manager and select **File** > **View Installed Packages**. Expand a package group and select a package to see the package name and version number.

  - Start your product, and click **Help** > **About** to see the offering name and version number.

- What is your operating system and version number (including any service packs or patches)?
- Do you have logs, traces, and messages that are related to the problem symptoms?
- Can you recreate the problem? If so, what steps do you perform to recreate the problem?

- Did you make any changes to the system? For example, did you make changes to the hardware, operating system, networking software, or other system components?

- Are you currently using a workaround for the problem? If so, be prepared to describe the workaround when you report the problem.

3. Submit your problem to IBM Rational Software Support. You can submit your problem to IBM Rational Software Support in the following ways:

- **Online**: Go to the IBM Rational Software Support Web site at https://www.ibm.com/software/rational/support/ and in the Rational support task navigator, click **Open Service Request.** Select the electronic problem reporting tool, and open a Problem Management Record (PMR), describing the problem accurately in your own words.

   For more information about opening a service request, go to http://www.ibm.com/software/support/help.html

   You can also open an online service request using the IBM Support Assistant. For more information, go to http://www.ibm.com/software/support/isa/faq.html.

- **By phone**: For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at http://www.ibm.com/planetwide/ and click the name of your country or geographic region.

- **Through your IBM Representative**: If you cannot access IBM Rational Software Support online or by phone, contact your IBM Representative. If necessary, your IBM Representative can open a service request for you. You can find complete contact information for each country at http://www.ibm.com/planetwide/.

2 *Product Requirements*

Installed software

Before starting the installation, ensure that all appropriate software has been installed, as indicated in the *Rational Change for DOORS Interface Release Notes*.

Note When necessary, the Release Notes are revised and reissued to provide the most current information. To ensure you have the latest version, download an electronic copy from the Rational Software Information Center.

3 *Installing the Interface*

This section contains the following information about installing the Rational Change for DOORS Interface:

Uninstalling prior versions of the interface

Before upgrading to a newer version of the Rational Change for DOORS Interface, you must uninstall all prior versions of the interface. Uninstall all previous versions of the interface software from the Microsoft® Windows® **Control Panel**.

To uninstall the interface:

1. Open the Windows **Control Panel**.

2. In **Control Panel**, double-click the **Add/Remove Programs** icon.

3. On the list of software that Windows can automatically remove, select the prior version of the interface.

4. Click **Add/Remove**, and then click **Yes**.

Installing Rational Change for DOORS Interface 5.7

Use the install wizard to install Rational Change for DOORS Interface 5.7. Before beginning the installation, close all open Rational DOORS sessions.

If you have not uninstalled all prior versions of the interface, do so before proceeding. See <u>Uninstalling prior versions of the interface (page 9)</u>.

To install the interface:

1. Double-click the `setup.exe` file to start the Rational Change for DOORS Interface install wizard.

2. In the **Welcome** dialog box, click **Next**.

3. Read the License Agreement, and then select **I Accept Agreement Terms**.

4. Select the path to your Rational DOORS installation, and then click **Browse** to select the installation path.

5. Type a folder name or select an existing folder for the installation, and then click **Next.**

6. Verify the settings for the installation location that you selected, and then click **Next.**

7. Click **Next** again to complete the installation.

Preparing Rational Change

The Rational Change for DOORS Interface relies on a specific set of Rational Change lifecycles. These lifecycles are delivered in two `CR Process` files along with the interface:

- `req_capture process`—contains the lifecycle used for requirements gathering.

- `doors_cs process`—contains the lifecycles needed for requirements change management and requirements implementation.

The following are guidelines regarding these `CR Process` files.

- If you would like all lifecycles available at the same time, use the Rational Change lifecycle merge capability to merge the two processes.

- To use a custom Rational Change lifecycle with this interface, see the customization document in the zip file you downloaded.

- If you are already using Rational Change with a custom `CR Process`, you should make the necessary changes so that your lifecycle supports the interface. For more information, see the customization document included in the zip file you downloaded.

- If you have been using Rational Change for other purposes and now want to use the requirements change management features of the interface, you should merge your lifecycle into the *doors_cs* process.

Below is an outline of the steps you must follow to install a `CR Process`. For exact instructions, see the Rational Change documentation.

1. Copy the XML file (e.g. `doors_cs_process.xml`) to the Rational Change server in the directory `$CS_HOME/cs_app/webapps/synergy/WEB-INF/cr_process`

2. Copy the template directory with the name matching the process (e.g., `doors_cs_template`) to the Rational Change server in the directory `$CS_HOME/cs_app/webapps/synergy/WEB-INF/package_templates`

3. Log on to Rational Change as a user with the *admin* role.

4. Load the `CR Process` file into the lifecycle editor, and then generate a process package.

5. Install the process package.

Upgrading from previous versions

If you are upgrading from a previous version of the Rational Change for DOORS Interface 5.7, perform the following steps:

1. Install the Rational Change for DOORS Interface 5.7. See <u>Installing Rational Change for DOORS Interface 5.7 (page 10)</u>.

2. Modify the configuration template to set the URL. See <u>Modifying the configuration template to set the URL (page 12)</u>.

If you are upgrading from a version of the interface that is **older than 5.2 and who are using requirements change management**, you must also upgrade the requirement change requests (RCR) data. See <u>Upgrading RCR data (page 13)</u>.

Modifying the configuration template to set the URL

To modify the configuration template to set the URL:

1. Start a Rational DOORS client session as a user with the *database manager* role.

2. On the main menu, select **Rational Change Interface > Define Configuration Templates**.

3. In **Template Name**, select the applicable template, and then click **Modify**.

4. In **URL for Change server**, type the server URL.

   For example, *http://myserver:8080/Change*.

5. In **Database Path**, type the database path, and then click **Next**.

6. In the Rational Change log on dialog box, type your log on information.

7. In the **Define Configuration Templates - DOORS** dialog box, click **Next** until you reach the **Step 6 Finish** tab.

8. Click **Finish**.

   Continue this process until you have set the URL for all templates.

9. Click **Close**.

Upgrading RCR data

If you are upgrading from a version of the interface that is older than 5.2 and you have used requirements change management, you must upgrade your RCR data to use the Rational Change for DOORS Interface 5.7.

If you have not used the requirements change management features of the interface, you do not need to perform these steps.

Caution Because the upgrade process is **irreversible**, back up your Rational Change and Rational DOORS databases before performing this upgrade. When the upgrade process is complete, the requirement change data stored in Rational Change is no longer usable with earlier versions of the Rational Change for DOORS Interface.

If you are upgrading from Rational Change for DOORS Interface 5.0 or 5.0.1, you must apply or reject all RCRs before performing this upgrade. Because of differences in functionality between the 5.0, the 5.0.1, and newer releases, data integrity cannot be guaranteed for RCRs that have not been applied to a Rational DOORS module or have not been permanently rejected**.**

To upgrade RCR data:

1. Start a Rational DOORS client session as a user with the *database manager* role.

2. On the main menu, select **Rational Change Interface > Define Configuration Templates**.

3. In **Template Name**, select the applicable template, and then click **Upgrade RCRs**.

4. In the Rational Change log on dialog box, type your log on information.

   If necessary, the upgrade process can be performed multiple times with the same template.

5. Click **Close**.

4 *Managing Packages*

This section contains the following information about managing Rational Change for DOORS Interface packages:

When installing packages, the Rational Change for DOORS Interface automatically verifies that the packages being deployed are compatible with the previously deployed packages.

A package is a set of files located in a specific directory structure, which is dependent on the package. Packages are necessary for updating or adding upgraded features to the interface. The interface administrator deploys these packages to the server so that users can install these upgrades on their systems.

Package names

The following are some examples of package names:

- Patch—`csint_patch_001`
- Customization—`csint_custom_Japan_01`

Package directory hierarchy example

The following is an example of a package directory hierarchy:

```
<directory>\
        package_info.xml
        dxl\... <full dir hierarchy with files to be deployed to
        clients>
        patch.dxl
        patch_dxl_version.txt
```

- The `dxl dir` package contains the files for the patch (including the directory hierarchy).

- The `patch.dxl` package contains the `dxl` code, which is used to deploy the package to the Rational DOORS clients.

- The `patch_dxl_version.txt` package contains the version number of the `patch.dxl`.

Package contents example

The following is an example of the contents of a `package_info.xml`file:

```
<package>
<package_name>csint_patch_004</package_name>
<code_base>050400</code_base>
<info>
        <data><name>Description</name><value>Csint 5.7.0 patch
        04</value></data>
        <data><name>Creator</name><value>Rational Irvine Lab
        </value></data>
        <data><name>Create Date</name><value>March 2, 2009
        </value></data>
</info>
<allow>
        <package_name>csint_patch_002</package_name>
        <package_name>csint_patch_003</package_name>
</allow>
</package>
```

Package rules

The following are rules regarding packages:

- Any files added by the deployment feature will not be uninstalled by the Uninstall program. Use the Package Manager feature to remove those files prior to uninstalling the interface. See <u>Removing packages (page 18)</u>

- Each package needs to identify what package or packages it can overwrite.

- A package can be installed on a Rational DOORS client when all of the installed packages are on the allow list. A package can also be installed on a Rational DOORS client if any of the packages listed in the allow list have not been installed.

Modifying the allow list

If you are creating a custom package or have previously installed one, you might need to modify the allow list, which is located inside the `package_info.xml` file.

For example, if you have deployed a patch package and you have previously installed your own custom package, ensure that none of the files in your custom package will be overwritten by files in the patch package. Then, add the name of the custom package to the allow list of the patch package.

If the patch changes files that were customized, you must update your custom package with contents of the patch and redeploy it.

For more detailed information about packages, see <u>Managing Packages (page 15).</u>

Deploying packages

The package manager feature allows the administrator to deploy packages to the Rational DOORS server. The package manager option is only available to those users with *database-manager* roles or users with *custom* roles who have the privilege to manage databases.

To deploy a package:

1. On the main menu, select **Rational Change Interface > Package Manager**.

    The **Package Manager - DOORS** dialog box opens and displays a list of packages that are already installed.

2. In **Installed Packages**, click to select the package that you want to install.

3. Click **Add** to deploy the package.

4. If you are prompted to do so, close and restart Rational DOORS.

Removing packages

If an unneeded package was installed, the system allows the administrator to remove the package from the server. However, when the package is removed from the server, it is no longer available for users to install.

To remove a package:

1. On the main menu, select **Rational Change Interface > Packages Manager**.

    The **Package Manager -DOORS** dialog box opens and displays a list of packages that are already deployed.

2. In **Installed Packages**, click to select the package that you want to remove.

3. Click **Remove** to remove the package.

4. Click **OK** to close the dialog box.

5 *Configuring the Interface*

For the Rational Change for DOORS Interface to work properly, the Rational Change server and the interface concepts need to be configured so that they are mapped to the Rational Change change request process.

This section contains the following information:

- [Configuring modules (page 19)](#)
- [Configuring all modules (page 20)](#)
- [Defining configuration templates (page 21)](#)
- [Configuring modules for use with the interface (page 24)](#)
- [Copying module configurations (page 28)](#)
- [Creating and generating user-defined activity reports (page 29)](#)

During the configuration, you also select which features will be available to the users. You have the option of configuring modules individually or configuring all modules in a folder or project.

Configuring modules

Configuring each module of the interface is a three steps process.

1. Define a configuration template for each Rational Change server that you will use. See [Defining configuration templates (page 21)](#).

    The configuration template contains information about the Rational Change server and the `CR Process` file that the server installed. Also, only users with the Rational DOORS *database manager* role can perform this step.

2. Configure each module that will use the interface. See [Configuring modules for use with the interface (page 24)](#).

    When configuring the module, decide which configuration template to use and which components of the interface the module will use. Users with either the Rational DOORS *project manager* or *database manager* role can perform this step.

3. Copy a module's configuration. See <u>Copying module configurations (page 28)</u>.

   To make it easier to configure multiple modules the same way, the interface allows you to copy the configuration from one module that has been configured to other modules in the same Rational DOORS database.

Configuring all modules

Configuring all modules is a two step process.

1. Define a configuration template for each Rational Change server that you will use. See <u>Defining configuration templates (page 21)</u>.

   The configuration template contains information about the Rational Change server and the `CR Process` file that the server installed. Also, only users with the Rational DOORS *database manager* role can perform this step.

2. Right-click the folder or project, and then select **Rational Change Interface** > **Configure All Modules**.

Defining configuration templates

Defining a configuration template tells the Rational Change for DOORS Interface how to locate the Rational Change server. It also defines how the installed change request process maps to the concepts used in the interface.

To define a configuration template:

1. On the main menu, select **Rational Change Interface > Define Configuration Templates**.

2. Click **Create**.

3. In **Template Name**, type the new template name.

4. In the **Rational Change Server Configuration** section, in **URL for Change server**, type your server URL.

   For example, *http://myserver:8080/Change.*

5. In **Database Path**, type the database path.

6. Click **Next**.

7. In the **Rational Change Login** dialog box, type a valid Rational Change user name and password, and then click **OK**.

   If you are using the standard *doors_cs_process* without customization, click **Next** until you reach the **Step 5: Requirements Gathering** tab.

8. In **Rational Change Login User Role**, select the appropriate role for your Rational Change server, and then click **Next**.
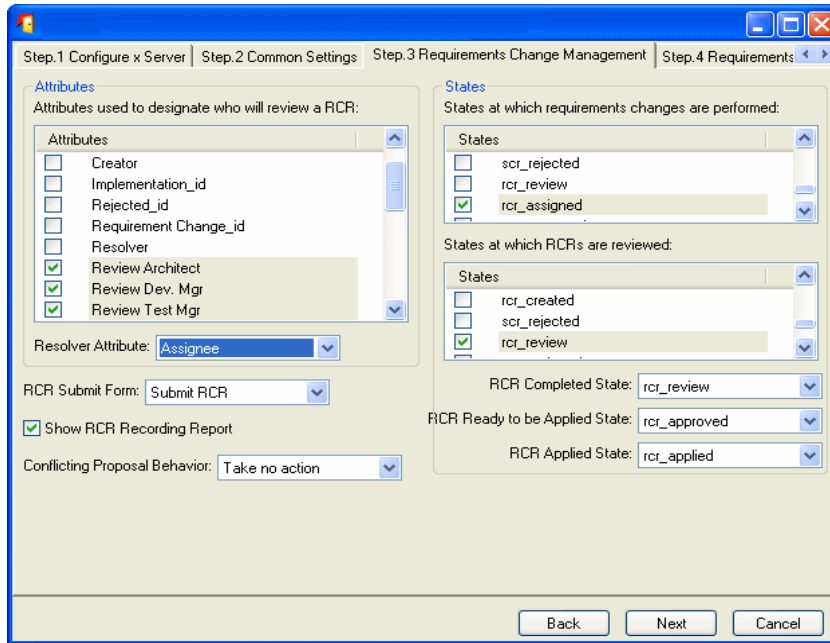
9. In the **Attributes** section, select the attributes used in your Rational Change lifecycle to denote which users will review RCRs.

10. In the **Resolver Attribute** box, select the resolver attribute.

    The resolver attribute is the attribute used in your Rational Change lifecycle to denote which user will associate requirement changes to an RCR.

11. In **RCR Submit Form**, select the applicable submit form in your Rational Change process used for implementation requests.

    If you have more than one submit form and would like users to be able to decide which form to use each time they submit an implementation request, select **User Selected**.

12. Select the **Show RCR Recording Report** option to show the RCR Recording report.

13. In **Conflicting Proposal Behavior**, select one of the following options:

   - **Take no action**
   - **Warn user of conflict**—When users try to make changes that will cause a conflict, a warning message is displayed. The user has the option of making or canceling the change.
   - **Prevent modification**—Users will not be allowed to make changes that will cause conflicts.

   Note Selecting any setting other than **Take No Action** causes a slight delay when you open the modules to edit them.

14. In **States at which requirement changes are performed**, select the state or states in your Rational Change lifecycle at which users associate proposed requirement changes with RCRs.

15. In **States at which RCRs are reviewed**, select the state or states in your Rational Change lifecycle at which users review RCRs.

16. In **RCR Completed State**, select the applicable completed state.

   The **RCR Completed State** is the state in your Rational Change lifecycle to which you want an RCR to be transitioned when a user completes it.

17. In **RCR Ready to be Applied State**, select the applicable state.

   This is the state in your Rational Change lifecycle where the RCR has been reviewed, approved, and is now ready to be applied to Rational DOORS.

18. In **RCR Applied State**, select the applicable applied state.

   This is the state that RCRs will be transitioned to when they have been applied to Rational DOORS.

19. Click **Next**.

20. In **Use Submit Form**, select the applicable submit form in your Rational Change process used for implementation requests.

   If you have more than one submit form and would like users to be able to decide which form to use each time they submit an implementation request, select **User Selected**.

21. Click **Next**.

22. In **Default Query String**, type the default query string to be used during requirements gathering.

   Skip this step if you do not plan to use the requirements gathering feature of the interface.

23. Click **Next**.

24. Review the selections you have made, and then do one of the following:

- If everything is correct, click **Finish** to save your configuration template.
- If there is anything you need to fix, click **Back** to return to the correct tab, and then make the necessary corrections.

Configuring modules for use with the interface

After you have defined at least one configuration template, you can configure your modules for use with the interface.

It is possible to simultaneously configure all modules inside a folder or project by right-clicking the folder or project in the Rational DOORS Database Explorer, and then selecting **Rational Change Interface** > **Configure All Modules**.

To configure a module for use with the interface:

1. In Rational DOORS, open the module you want to configure.

2. On the main menu, select **Change Management > Configure Module**.
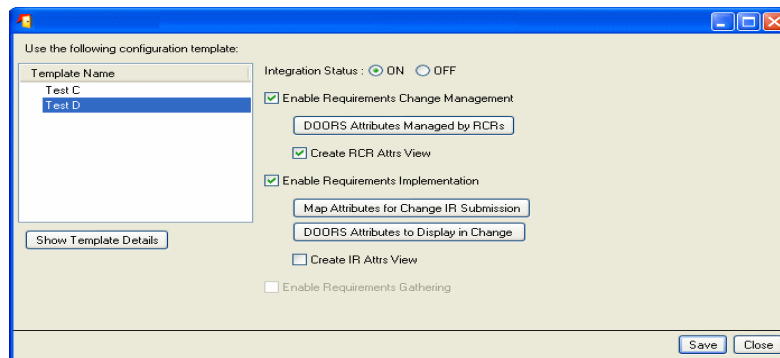
3. In **Template Name**, select the configuration template you want to use for this module.

For information about creating a configuration template, see <u>Defining configuration templates (page 21)</u>.

4. In **Integration Status**, do one of the following:

   • To show the interface menus, select **ON** to activate the interface for this module.

   • If you do not want to use the interface for this module, select **OFF**.

5. To enable requirements change management for this module, select **Enable Requirements Change Management**.

   For more information, see the "Requirements Change Management" chapter in the *IBM Rational Change for DOORS Interface User Guide* document.

6. Click **DOORS Attributes Managed by RCRs**.

   The **Select Managed Attributes - DOORS** dialog box opens.

   a. Select the attribute or attributes you want to manage with requirements change management, and then click **Apply**.

   b. Click **Close** to close the **Select Managed Attributes - DOORS** dialog box.

   If a user modifies the value of any attribute that is not selected in this dialog box, the changes are saved to the Rational DOORS document rather than being associated with an RCR.

7. To enable the requirements implementation features of the interface for this module:

    a. Select **Enable Requirements Implementation**.

        For more information, see the "Requirements Implementation" chapter in the *IBM Rational Change for DOORS Interface User Guide* document.

    b. Enable attribute mapping for implementation request (IR) submission:

        - Click **Map Attributes for Change IR Submission**.

        - Select the attribute or attributes you want to map.

        - Click to highlight the attribute, and then click **Edit**.

        - Click to highlight the attribute, and then click **Close**.

        - Click **OK**.

        When users submit IRs, the IR Submit form displays the Rational DOORS attributes values in the **Change Attribute** field in the **Select Attributes for Change IR Submission - DOORS** dialog box.

    c. To customize which Rational DOORS attributes are displayed in Rational Change:

        - Click **DOORS Attributes to Display in Change**.

        - Select the attribute or attributes, and then click **Apply**.

        - Click **Close**.

        The selected Rational DOORS attributes are available in Rational Change.

8. To enable the requirements gathering feature of the interface for this module, select **Enable Requirements Gathering**.

For more information, see the "Requirements Gathering" chapter in the *IBM Rational Change for DOORS Interface User Guide* document.
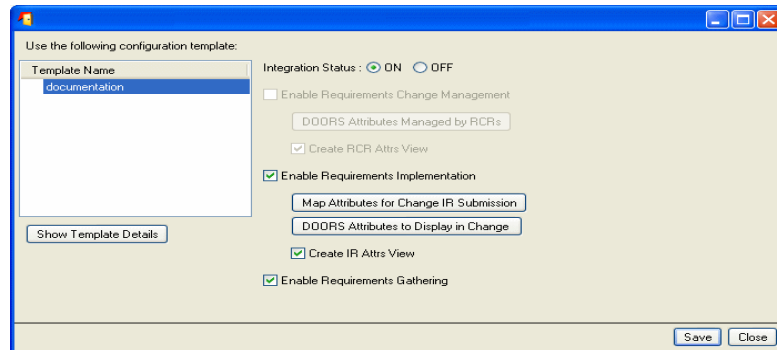

9. Click **Save**.

Copying module configurations

If you have several modules that will use identical configuration settings for the interface, you can copy the settings from one module to the others to save time. However, you must be able to modify all modules to which you are copying configuration information.

To copy the configuration of one module to other modules:

1. On the main menu, select **Rational Change Interface > Copy Module Configuration**.
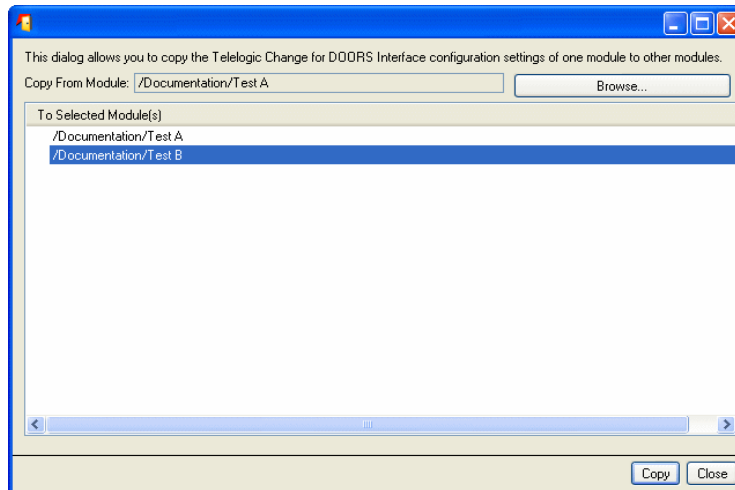
2. In **Copy From Module**, click **Browse** to select a module from which to copy changes, and then click **OK**.

3. In **To Selected Module(s)**, select one or more modules from which to copy the configuration.

4. Click **Copy.**

    The system displays a configuration overwrite warning message.

5. Click **Confirm**.

The **Copy Results - DOORS** dialog box opens and reports that the module was successfully copied.

6. Click **Close**.

The Rational Change for DOORS Interface is ready to use.

Creating and generating user-defined activity reports

To create your own report, back up and edit the existing XSL template, and then generate the report. For more information about creating and generating a user-defined activity report, see the customization document in the zip file you downloaded.

Appendix: Notices

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