

Rational Asset Manager v7.2 Migration Guide

By Grant Larsen and Patchanee Petprayoon

Grant Larsen, STSM, Chief Architect, Ration Asset Management and Patchanee Petprayoon, Unleash the Labs, Solution Architect

Contents

1	INTRODUCTION	4

- 2 BACKGROUND 4
- 3 AGENDA 4
- 4 INFORMATION TO BE CAPTURED BEFORE MIGRATION 5
- 5 CAPTURE DEVELOPMENT ENVIRONMENT WORKFLOW 13
- 6 RECREATE DEVELOPMENT ENVIRONMENT IN TEST ENVIRONMENT 17
- 7 HOW TO IMPORT FROM DEVELOPMENT TO TEST ENVIRONMENT 38
- 8 SUMMARY 42



1 Introduction

As demands for productivity in the use of software has increased, the ability to execute processes efficiently with quality control has become increasingly more important. The efficient execution of the product creation and test execution of software processes enhances product quality and stakeholder satisfaction.

This document discusses step by step instruction on how to migrate your development environment to the test environment to help ensure the quality of your software development

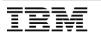
2 Background

Software testing is one of the key components in the software development. It aims at evaluating capability of a program or system and determining that it meets its required results before it goes into to production. Before the product can be released into the production environment, we will be using the testing environment area for quality assurance. Even though testing can never completely identify all the defects within software but it still an important piece that will allow us to mitigate risks before the product is roll out.

3 Agenda

For the remainder of this documentation, we will primarily discuss:

- I. Information that needs to be captured from Rational Asset Manager Development Environment before you can start your migration process.
- II. How to capture the Rational Team Concert Development Environment Workflow from Development Environment
- III. How to recreate your Rational Asset Manager v7.2 Development Environment on the Test environment
- IV. How to import Library from Development environment to the Test environment



4 Information to be captured before migration

Information that needs to be captured from Rational Asset Manager Development Environment before you can start your migration process.

For our example, we will be using the "export library" to help us export the assets from one environment to the next. For the small number of assets using the "export library" is suitable for this task. However, if the creation of export files starts to get very big then you may want to consider using the "batch uploader" tool instead.

4.1 Create the library (zip file)

a. Login as the Administrator and click Libraries



b. Select "New Library".

If you want to clone the exact copy from this Rational Asset Manager server, you need to select everything and add them into the library that we are about to create. This will copy the communities, user groups, assets, and the information model (Asset Types, Category Schemas, Asset Attributes, and Relationships). It will NOT (in Rational Asset Manager v7.2) copy the lifecycle configurations for the communities.

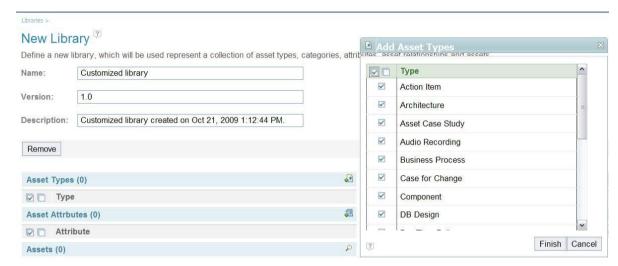




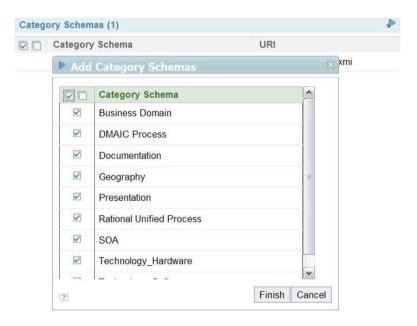


c. To select all of "Asset Type", click on the second checkbox under "Asset Type" will bring all of the asset types to your library. If you want to pick and choose one or the other but not all of the asset type > expanding this

icon on the right



d. Select "Category Schemas" and select all.



e. Select "Relationship" and select all.





f. Select "Asset Attribute" by clicking at the second checkbox under "Asset Attribute" will add all of the Asset Attribute to your library.

If you want to pick and choose one or the other but not all of the attribute by expanding on this icon on the right



g. Select "All Asset" > Click on this icon will bring up the Search for Assets page. Type in "*" to search for all asset

Search for Assets³



h. Once the "Search for Assets" returns all the assets that it found > Click on Tasks > Add all results

Note: Add all results might take awhile to complete. It's depending on the size of your assets and how many asset it has to bring in to the library. Basically the library is just of the big "zip" file that we will be bringing in to the Rational Asset Manager Test Environment



i. Once it's completed you will see the confirmation that these assets have been added to the library

① 49 assets added to the library
Search for Assets ?

j. Select "Tasks" > View Library



k. List of the "Asset that show you just added is now showing up on the "Create Library page"



1. Click "Create and Enable" at the bottom right corner of this page.



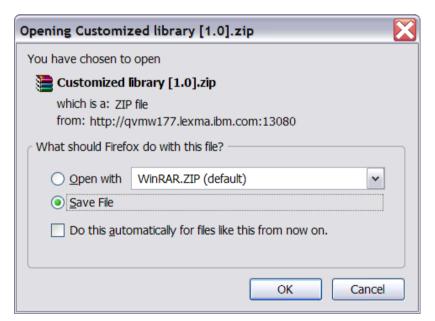
m. One it's done you should see the new library that you just created listed under the "Libraries" Name





n. Click on Version 1.0 then "Export" to a zip file





4.2 Capture Information about the Community Lifecycle

Now we need to capture the information about the community lifecycles since they are not included in the asset library export. To do this perform the following for each community lifecycle

a. Take a screenshot of the lifecycle, such as the one shown below

Health Survey2



b. For each state AND transition, take a screenshot or write down the information about the collaborators, reviewers, the policies that are selected and their configuration, and the conditions for the transition to occur

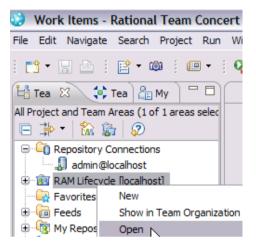




5 Capture Development Environment Workflow

Capture the Rational Team Concert Development Environment Workflow from the Development Environment

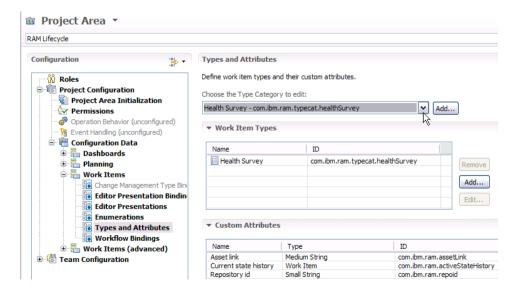
1. Open the RAM Lifecycle project area



2. Select the Process Configuration tab

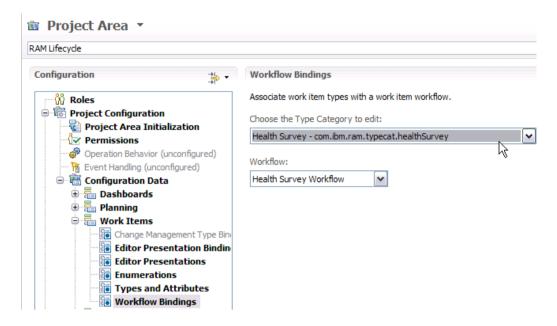


3. Expand the Project Configuration > Configuration Data section, select the Type Category that is mapped to the workflow you are migrating and take a screen shot (such as the one below). This will be used later for entering into the next Rational Team Concert environment.

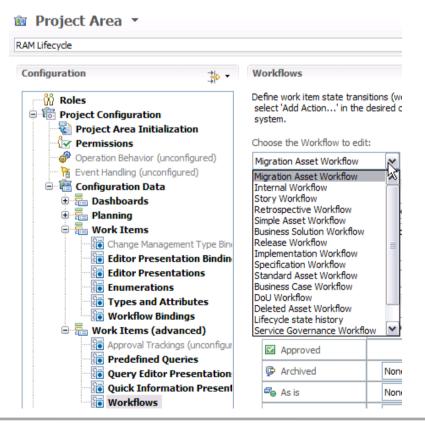




4. Select the Workflow Binding section and select the Type Category (as shown below) to illustrate the binding to the workflow; and take a screen shot.



5. Select the Workflows section in the tree (as shown below) and then select the Workflow to edit in the dropdown box (as shown below).



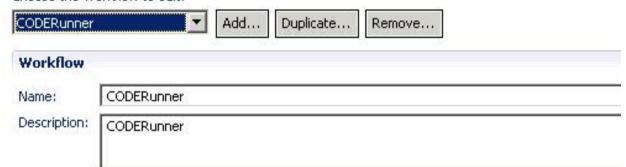


6. Take screenshots of the Workflow page, be sure to capture the Start Action, Transitions, the States, and the Actions

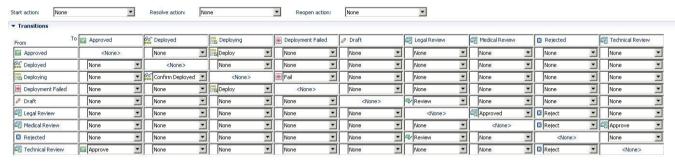
Workflows

Define work item state transitions (workflows). Workflows are built of States, Actions and Resolutions. necessary context to the system.

Choose the Workflow to edit:



Transitions



States

▼ States Name Show resolution Group Description Approved None Approved Deployed None Deployed Deploying None Deploying Deployment Failed None Deployment Failed Draft None Draft Tegal Review None Legal Review Medical Review None Medical Review Rejected None Rejected Technical Review Technical Review None

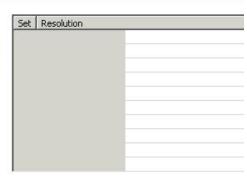


Actions

▼ Actions

Name	Target State	Description
Approve	Approved	Technical Approve
Approve	📆 Technical Review	Medical Approve
Approved	Medical Review	Legally Approved
Confirm Deployed	Deployed	
■Deploy	Deploying	
🖲 Fail	Deployment Failed	
☑ Reject	☑ Rejected	
Review	🚭 Legal Review	
Submit Su		





6 Recreate Development Environment in Test Environment

Recreate your Rational Asset Manager 7.2 Development Environment on the Test environment

Rational Team Concert (Test Environment)

From the Rational Team Concert client (Test Environment), you need to create the Rational Team Concert workflow on the Test environment

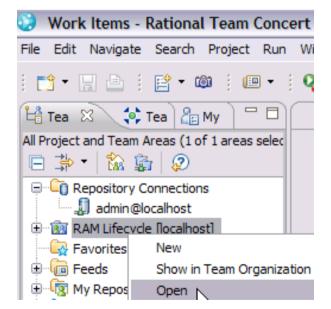
Create a workflow by using the Rational Team Concert client (Test Environment)

To create a workflow:

 From the Rational Team Concert client, connect to the Rational Team Concert server that was supplied with Rational Asset Manager. You must use the same server URL for the Rational Team Concert connection that is set for the Rational Team Concert server that was supplied with Rational Asset Manager. To find the URL, Using the Rational Asset Manager admin account to login to the Rational Asset Manager Server a, click Administration > Configuration > Internal Rational Team Concert Path > Path.

You must use the same Web server admin credentials to log in to this new connection. You must connect to the RAM Lifecycle project area the first time in your Rational Team Concert client. Afterwards, if you are connected, you will see the RAM Lifecycle project area.

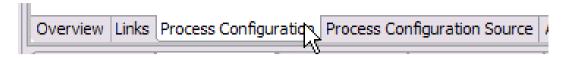
2. Open the RAM Lifecycle project area



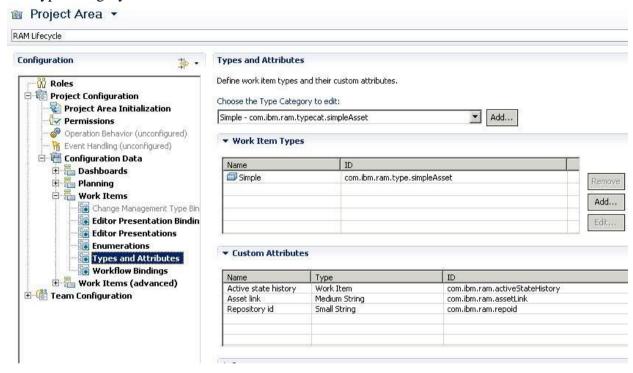




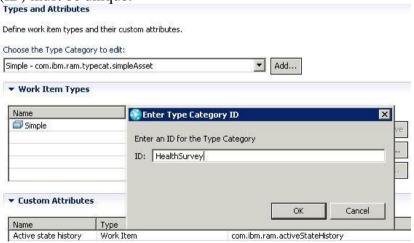
3. Select the Process Configuration tab



4. Expand the Project Configuration > Configuration Data > Work Items > select the Type Category.



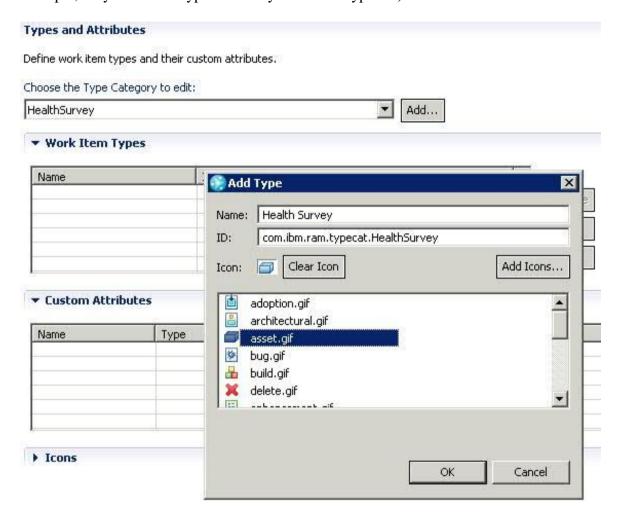
a. To create a new work item category, next to the Choose the Type Category to edit, click Add and enter a name for the work item category. This name (ID) must be unique.





b. You must also add a work item type to a category. Under Work Item Types, click Add. (The Work Item Type is what will be visible as a Workflow in Rational Asset Manager.)

In the Add Type window enter a work item type name and ID (for example, "MyWorkItemType" and "MyWorkItemTypeID").



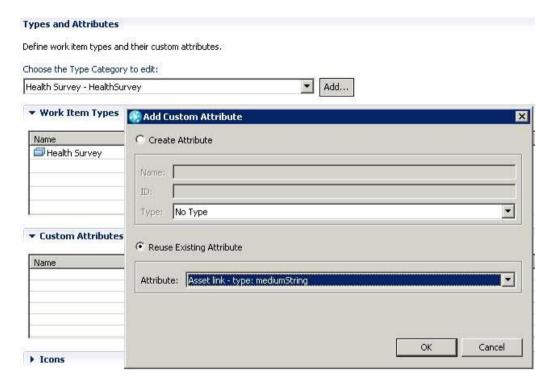
Note: The workflow item type name can be any name that you specify but it will be displayed as the workflow in Rational Asset Manager (not the workflow category name or the work item type category). The ID must be unique



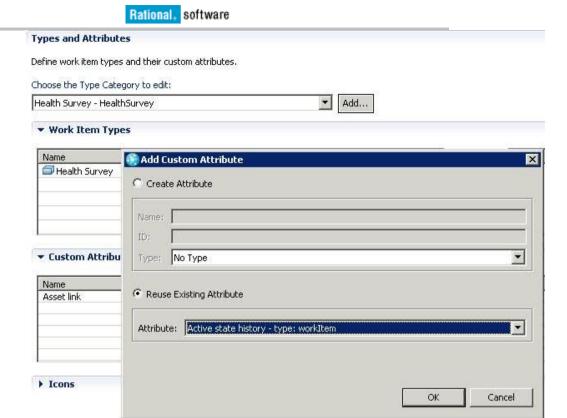
- c. In the Custom Attributes section, you must add three required attribute types:
 - i. Click Add to select Reuse Existing Attribute, and from the list choose Asset link.

Click OK.

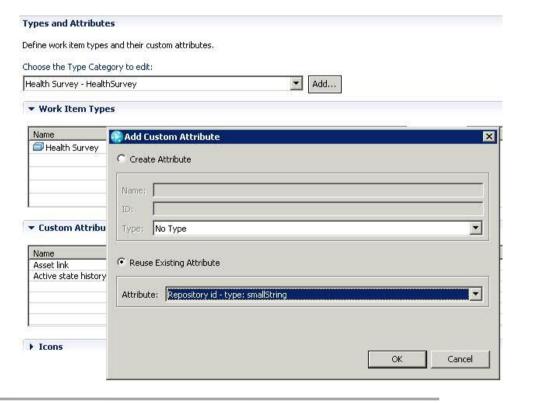
Specify these three required:



ii. Click Add, select Reuse Existing Attribute, and from the list choose Active state history .Click OK

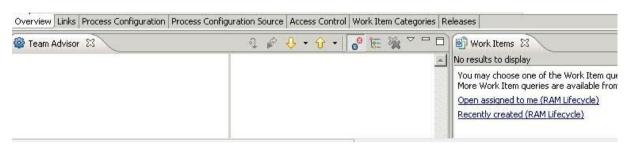


iii. Click Add, select Reuse Existing Attribute, and from the list choose Repository id. Click OK

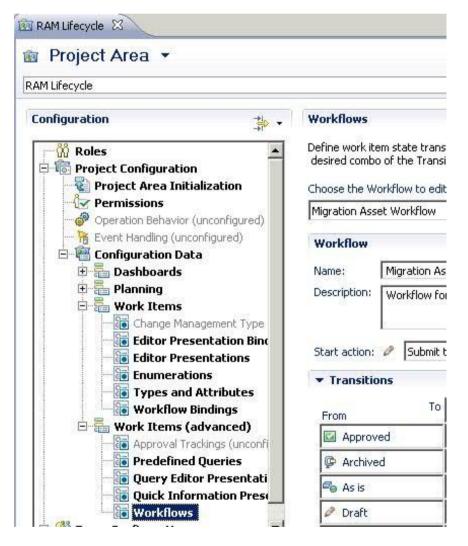




- d. Click Save.
- 5. Click the RAM Lifecycle > Open > Process Configuration tab.



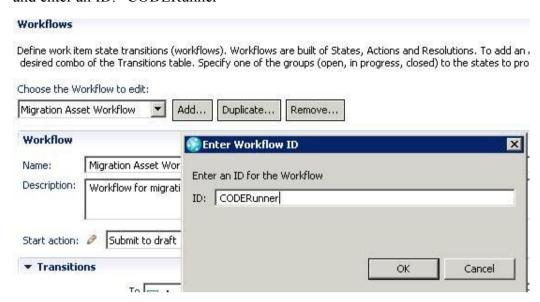
- 6. Create a new Rational Team Concert workflow.
 - a. In Rational Team Concert, in the Project Area, click Configuration Data > Work Items (advanced) > Workflows







b. To create a new workflow, under Choose the Workflow to edit click Add, and enter an ID. "CODERunner"



c. In the Name field, enter a name for the workflow.

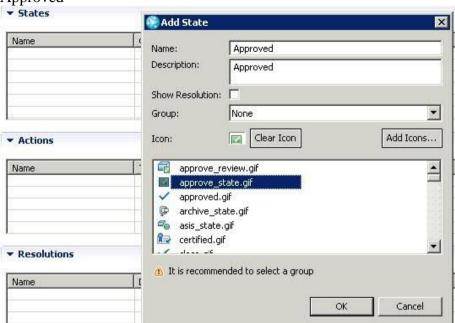


d. Create the state transition model.

To create a state click States; then click Add and name the state. Repeat this step for each state in your workflow.

There are "9" states that you have to create:

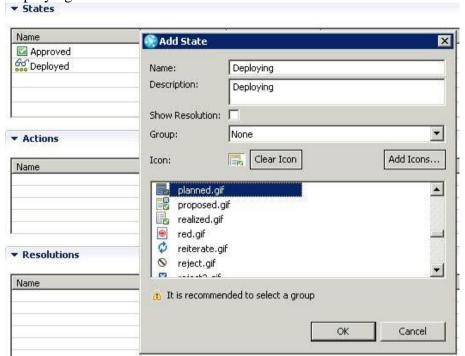
1) Approved



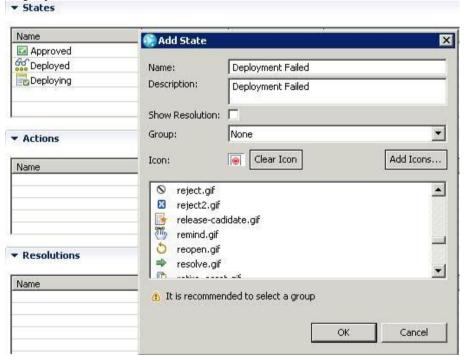
2) Deployed

▼ States Name 🚱 Add State Approved Name: Deployed Description: Deployed Show Resolution: None Group: $\overline{}$ **▼** Actions GG Clear Icon Add Icons... Icon: Name unconfigure.gif • anload-library.gif unresolve.gif 🧸 wontdo.gif **▼** Resolutions works.gif • Name It is recommended to select a group OK Cancel

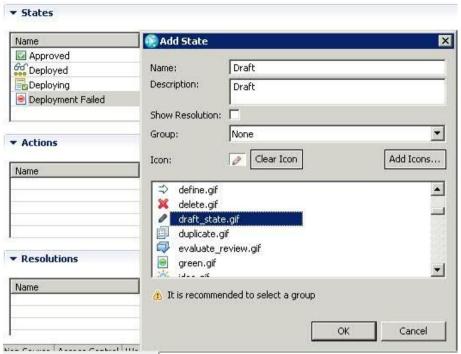
3) Deploying



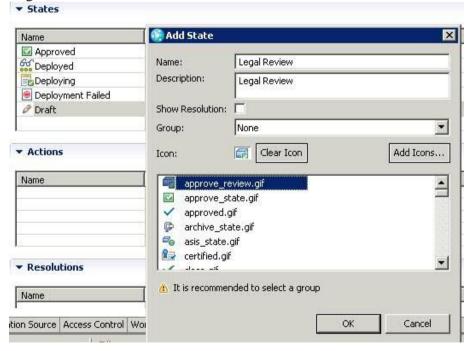
4) Deployment Failed



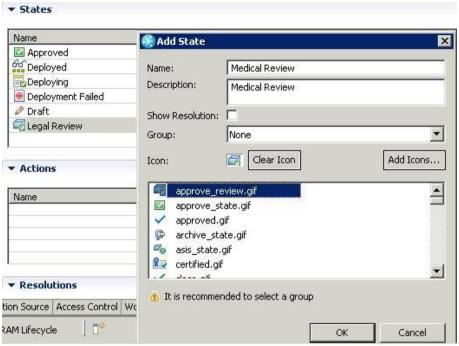
5) Draft



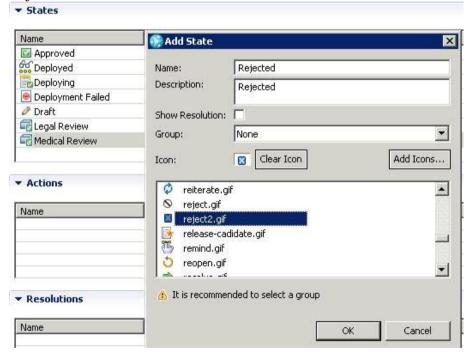
6) Legal Review



7) Medical Review

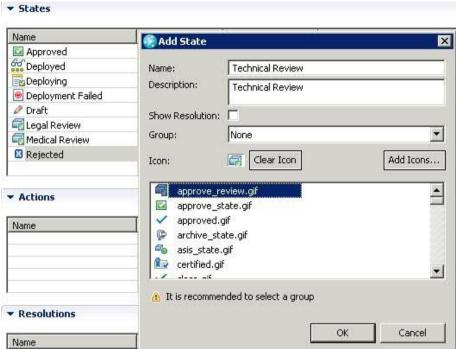


8) Rejected

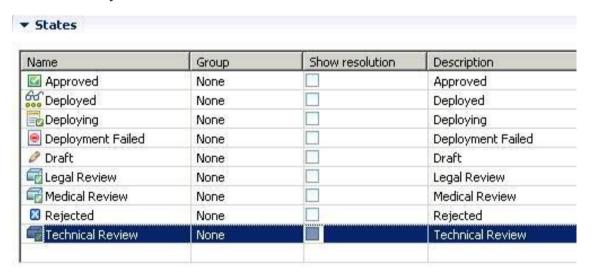




9) Technical Review



Once it's done you should see the all of the 9 states listed on the States table

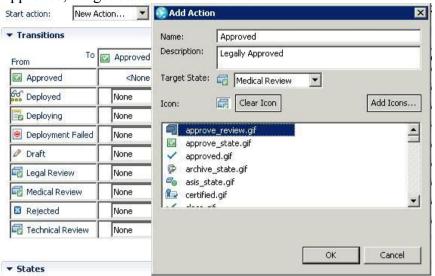


e. A Start action is required. From the list, enter a state for the Start action by choosing an existing state or creating a new one.

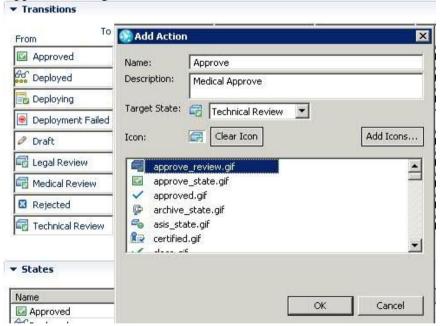
Click Start action "New Action"

There are "9" action that need to be added:

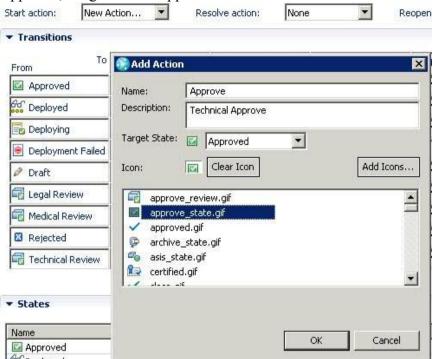
1) Approved, Target State "Medical Review"



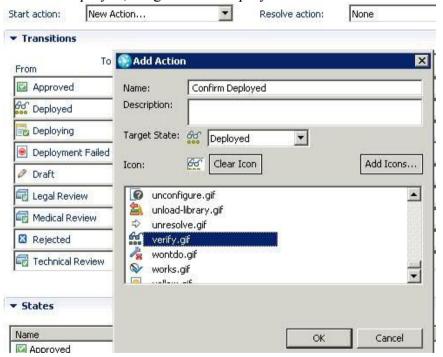
2) Approved, Target State "Technical Review"



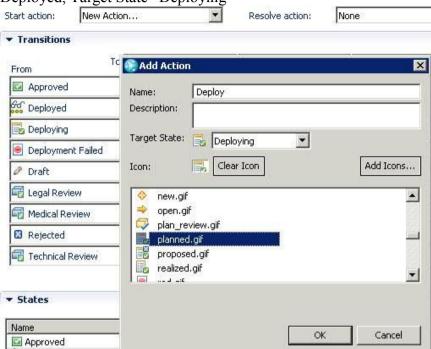
3) Approve , Target State "Approved"



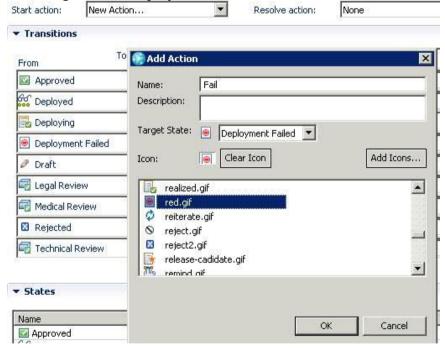
4) Confirm Deployed, Target State "Deployed"



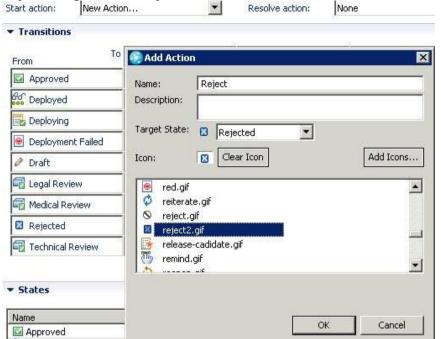
5) Deployed, Target State "Deploying"



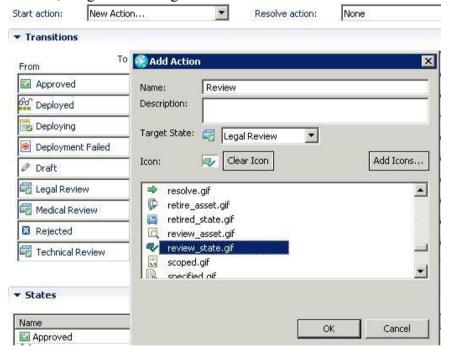
6) Fail, Target State "Deployment Failed"



7) Reject, Target State "Rejected"



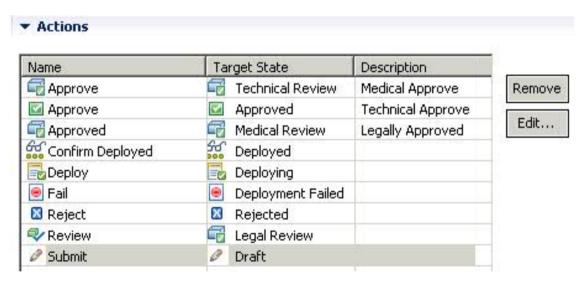
8) Review, Target State "Legal Review"





Optional: You can add icons. They are not required but using them can help make the asset display in Rational Asset Manager more understandable to users.

f. Click Save. Once it's completed you should see all the action listed under the "action table"





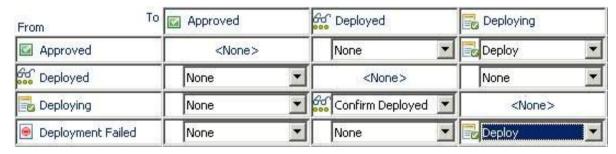
- g. To create a transition, click Transitions; then click Add and name the transition. Repeat this step for each transition in your workflow and click Save when finished.
 - i. From "Approved" row go to "Deploying" column select "Deploy"



- ii. Deploying row, all column value select "NONE".
- iii. From "Deploying" row go to "Deployed" column" select "Confirm Deployed", go to "Deployment Failed" column select "Fail"



iv. From "Deployment Failed" row go to "Deploying" column select "Deploy"



v. From "Draft" row go to "Legal Review" column select "Review"

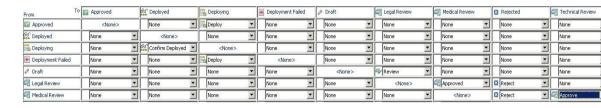




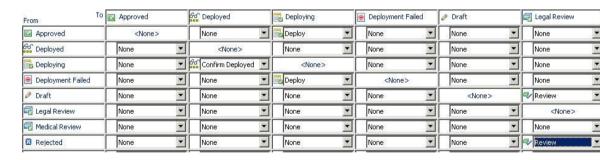
vi. From "Legal Review" row go to "Medical Review' column select "Approve" and go to "Rejected" column select "Rejected



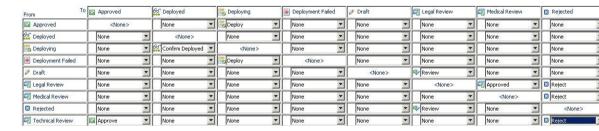
vii. From "Medical Review" row go to "Rejected" column select "Reject" and go to "Technical Review" column select "Approve"



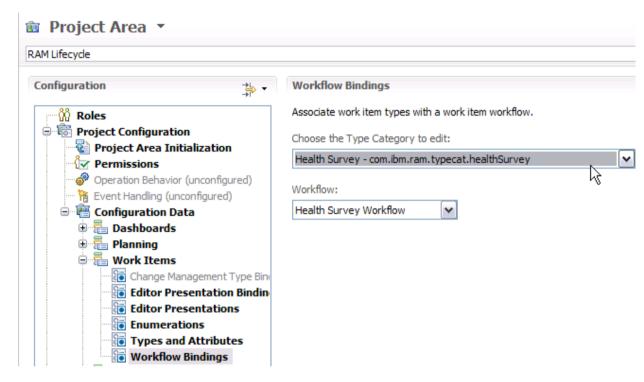
viii. From "Rejected" row go to "Legal Review" column select "Legal Review"



ix. From "Technical Review" row go to "Approved" column select "Approved", go to "Rejected" column and select "Rejected"



- 7. Bind the new workflow and new work item category.
 - a. Select Configuration Data > Work Items > Workflow Bindings.
 - b. From the lists, select the names of the work item type category and workflow that you created in the previous steps.



- c. Click Save. You are finished with creating the new workflow.
- 8. To make your new workflow available in Rational Asset Manager, restart Rational Asset Manager or wait ten minutes for the caches to be cleared. Rational Asset Manager includes an in-memory cache of workflows. The cache is cleared after 10 minutes, but if Rational Asset Manager is recycled, it picks up an updated copy of the workflows from the Rational Team Concert server. You can also click Tools > Reset Caches. In version 7.2, the cache is only cleared on the server that the user is logged into. In a cluster environment, this feature might cause a problem because it clears the cache on one server, but will not clear the Rational Team Concert cache on other servers in the cluster.
- 9. To validate that the new workflow is available, log in to Rational Asset Manager as an administrator and select Administration and under Communities select a community. For the given community click Lifecycles > New Lifecycle. In the list of workflows, you should see the name of the workflow that you created.



After Rational Asset Manager is recycled, if the new workflow is not visible, the workflow might not be configured correctly. You must use the Rational Team Concert client to make the necessary updates (for example, if you did not specify a unique ID for your work item, then it will not appear). Log in to Rational Team Concert and review the details of the new work item and workflow to ensure that you specified a unique work item type name, the required attributes, a workflow Start action, and a correct state transition model. Make changes as needed, save them, restart the Rational Asset Manager server and verify that the workflow is available.

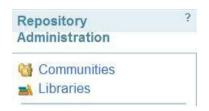


7 How to import from Development to Test environment

How to import Library from Development environment to Test environment

Rational Asset Manager (Test Environment)

 Login as Rational Asset Manager repository Admin click on "Libraries" and make sure that you know where is the location where you have exported your Rational Asset Manager development library ".zip" file.



2. Import Library > Browse > location of your "Rational Asset Manager development library" > Import

Import Libraries Import libraries of predefined asset types, asset attributes, relationships, category schemas and assets. C:\EM 7.5\Customized Browse... | Import

3. Click "Enable"

Note: We recommend that you select "Enable" instead of "Enable and Disassociate" because if you select "Enable and Disassociate" you will lose the connection to the Rational Asset Manager library from the development environment and the history of where this library came from.

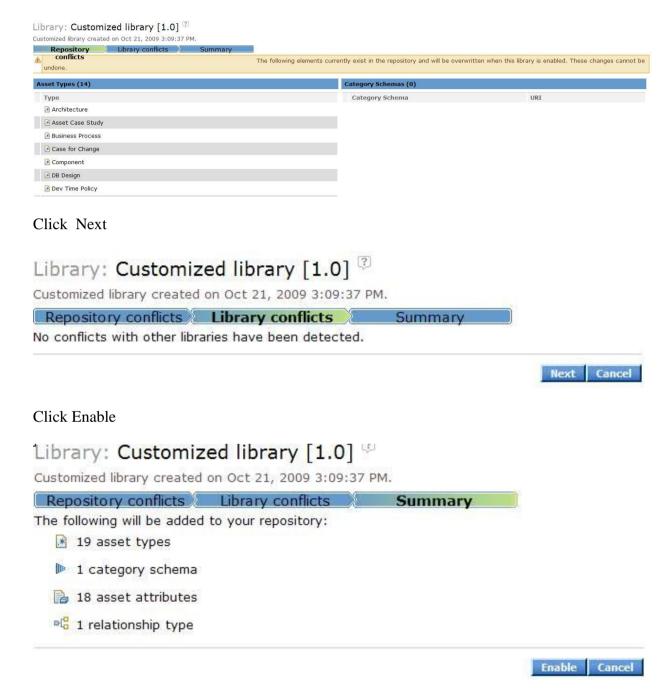








4. If there is any conflict Rational Asset Manager will detect and give you a warning. If this is the first time that you import the development Rational Asset Manager library into the test environment there shouldn't be any conflict.



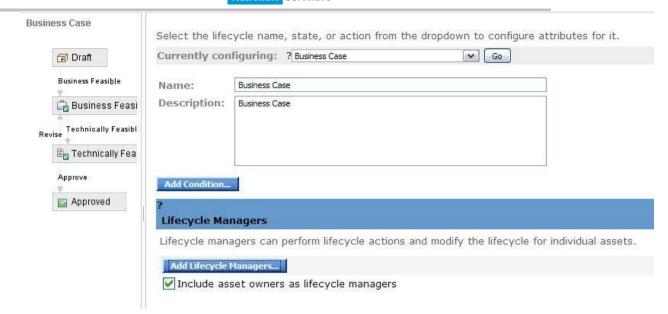
5. Next: We need to add the RAM Lifecycle workflow to the test environment



Click on Administrator tab > Community, select your community > Click on Lifecycles Tab > New Lifecycle > Select you Lifecycle name in our example it is "Health Survey2" > Click "Next"

Health Survey2





Add Lifecycle community manager > Add



Click "Save and Finish"



8 Summary

A successfully migration from Development environment to Test environment is not difficult to do. However, a careful planning and a familiarity of how to create the Rational Asset Manager process workflow from Rational Team Concert would be a great help. Most of the time, the show stopper for this migration task is where, the Rational Asset Manager process workflow is not showing up in RAM lifecycle tab. In order to avoid this problem, it is recommended you create a dummy Rational Team Concert process workflow and familiarize yourself with this process before you embark on the migration journey.

