Introduction to IBM Rational ClearQuest

Course Summary

Description

This course is a one-day introduction to ClearQuest designed for end users and anyone else who will be working with ClearQuest in any role. No prior ClearQuest knowledge or experience is assumed or is necessary. The purpose of the course is to have students master ClearQuest from a user perspective by providing a thorough grounding in the concepts of what ClearQuest does, how it is supposed to be used and how users optimally interact with the product. These ideas are reinforced with hands on challenge exercises and labs designed so that students can master the concepts and techniques presented.

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Objectives
At the end of this course, students will be able to:

- Understand what ClearQuest automates and to identify how ClearQuest is being used or should be used in their own work environment.
- Understand how ClearQuest implements any soft of change request or other process tracking, generalizing from the usual defect-tracking model.
- Understand the design goals and architecture of ClearQuest as a context to understand what they are doing with change items, schemas, charts and queries, and to understand why they are doing it that way,
- Be able to use their understanding gained through the first two objectives to learn, use and adapt ClearQuest best practices and optimize their use of ClearQuest as users. To be able to use their understanding gained from the first three objectives to identify and avoid common mistakes, errors and bad usage of ClearQuest.

Topics

- Using the ClearQuest user interface – adding and working with process items.
- Understanding what schemas are and how they work.
- Writing and using ClearQuest queries.
- Creating and using ClearQuest charts and how to interpret them.
- Extending the reach of ClearQuest using email.
- Trouble shooting ClearQuest

Audience

This course is designed for anyone who will be working with, supporting or using ClearQuest. This is an entry-level course and presupposes no prior knowledge or experience of CRM or Rational Software.

Prerequisites

There are no prerequisites required for this course.

Duration

One day

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Course Outline

I. Change Request Management (CRM)
- A. Defining (CRM) and its importance
- B. Basic CRM terminology and concepts.
- C. Typical CRM processes and CR life cycles (states).
- D. Typical work flow in a CRM – following a change request through its life cycle.
- E. CRM and product application life cycles.
- F. When CRM fails us – standard pitfalls to supporting CRM

II. Introduction to ClearQuest
- A. ClearQuest as a CRM automation tool
- B. The ClearQuest project, schema and schema repositories.
- C. ClearQuest interface walk through
- D. Users, requests, records, metadata, queries, charts and reports.
- E. Request states and events/actions that trigger state changes.

III. Generalizing ClearQuest
- A. The state model for process items
- B. Using ClearQuest as a generic tracking tool.
- C. Case study: requirements process tracking
- D. Case Study: test management tracking

IV. The Schema
- A. How a schema works.
- B. The state transition model
- C. Forms, actions, fields and data
- D. Adding functionality with packages.
- E. Looking at some sample schemas
- F. Schema repositories.

V. ClearQuest GUI
- A. Creating records
- B. State changes, actions and triggers.
- C. Update Operations.
- D. Audit trails, metadata and views.
- E. Dependencies between different record types.

VI. Queries
- A. Using the layout editor
- B. Using the filter editor
- C. Executing and analyzing queries
- D. Dynamic versus static queries.
- E. Compound queries.
- F. Editing queries for reuse

VII. Charts
- A. Status, trend and aging charts..
- B. Interpreting the charts
- C. Writing a query to generate a chart
- D. Graphic options.
- E. Best practices with charts.

VIII. Extending the Scope of ClearQuest
- A. Email notifications
- B. Email submissions
- C. Web based clients
- D. Rational Suite integration.
- E. Triggers and scripts.
- F. Functionality from packages.

IX. Final Wrap up
- A. Review of concepts.
- B. Best practices summary.
- C. Common errors and pitfalls summary.
- D. Questions.

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